

An Examination of Learning  
Resulting from a Transition from a Directed to a Self-Directed  
Work Environment

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## **Abstract**

This study focuses on the process of self-directed learning that individuals go through as they adapt to new work situations. This is a study of how one critical incident, specifically the transition from a traditional office structure to a home office structure, affected employees and what their learning process was as they adapted to the new environment. This study has 3 educational foundations: adult learning, self-directed learning, and the social context from which the learning will occur.

Six women and 2 men were interviewed approximately 1 year following the transition. Analysis of the data revealed 5 themes of: impacts of the self-directed environment on participants' personal lives, their roles, skill set, productivity, and the physical environment; support offered by the organization, family, and office administration; personal development, specific learning needs, and personal skills; boundaries as they relate to family and work; and skill set and orientation requirements of new home office employees.

The findings revealed the learning processes of the 8 participants. The learning processes of these participants were discussed within a theoretical framework of the learners, their immediate surroundings, and the larger social environment. The results indicated that the transition from a directed work environment to a self directed work environment is a complex, interrelated process. An element found throughout the theoretical framework is that of control. A second critical element is the need for participants to have a clearly defined work role and an opportunity to engage in discussion with peers and the community. Further findings reinforced the importance of climate and found that the physical environment is a key factor in a successful self-

directed work environment. The findings of this study revealed that no one factor makes an individual function successfully in a self-directed work environment, but that it is a complex interplay among the learner, their immediate surroundings, and the social environment that will have the greatest impact on success.

Recommendations are made which can be used to guide organizational leaders in facilitating employees' transition from a directed to a self-directed work environment. Additionally, recommendations are made for further research in the area of self-directed work environments.

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## **CHAPTER ONE: THE PROBLEM**

This study focuses on self-directed learning and the process of learning that individuals go through as they adapt to new situations. This is a study of how one critical incident, specifically the transition from a traditional office structure to a home office structure, affected employees and what their learning process was as they adapted to the new environment. This study has three educational foundations: adult learning, self-directed learning, and the social context from which the learning will occur.

### **Background of the Problem**

The 1990s were a time of downsizing and restructuring. This study examines one organization's response to decreased funding and its resulting impact on employees within the community division. The organization under study is a provincial organization with a mandate to conduct health-related research, to develop proven products, and to disseminate the results and products to the province of Ontario. In order to disseminate information and products, the Community Department (CD) has a mandate to work with communities throughout the province. Prior to 1997, CD staff were located in 26 offices throughout the province. Community-based professional staff were involved in consultation to community agencies, product development, and research.

The organization under study was faced with an \$8 million decrease in its operating budget. The Community Department was required to save \$550,000 in the operating budget. The CD Management Team was committed to saving as many jobs as possible and to maintaining service levels as the department restructured to meet the targeted savings. As a result, on April 1, 1997, 18 employees were moved into home

offices, representing 26% of the professional staff, and the department decreased the number of offices from 26 to 12 throughout the province.

There was no preselection of staff with respect to suitability to a home office environment, but there was extensive discussion among management with respect to the location of the office closures. Employees were, however, given some choice regarding their work environment. Employees chose from three different scenarios: travelling to and working from the nearest CD office, known as a hub office; setting up and working from a home office; or making arrangements for a free or limited-cost office space in a local host organization, known as a hybrid office. In some cases, travelling to the nearest hub office was not feasible, as the nearest hub office was 2 hours or more driving time away. In the selection of a home office scenario, employees were provided with a separate telephone line for business use, Internet and E-mail connection, a cordless phone, computer, fax machine, and office equipment and supplies. In the selection of a hybrid office, employees were required to negotiate the work space and were restricted to a small budget for rent. In all cases, the support staff in the nearest hub office provided administrative support. The Regional Administrative Assistant provided some additional administrative support for their area. The home office and hybrid office environments were new work environments for all employees.

At the time of the transition, the employees were also faced with the loss of colleagues, a redesign of work expectations, and the introduction of a new management information system. With the closure of offices, 14 administrative support positions became redundant. Employees who had significant years of service with the organization and who had personal relationships with the professional staff held many of the

administrative support positions. Work expectations for the professional staff moved from a “hands-on” to a more consultative role. For example, staff no longer participated in mall displays or health fairs but only consulted with community groups on the organization of such events. At the time of the work environment transition, the introduction of a computerized management information system replacing the paper and pencil version was also implemented.

At the time the decision was made to close offices, CD management made the commitment to examine the experiences of home office staff. At the time of the evaluation, most employees had been in their home offices for approximately one year. The study reported in this document was undertaken in conjunction with the larger evaluation process.

### **Statement of the Problem Situation**

Home office work environments are becoming increasingly common as leaders of organizations seek opportunities to reduce the costs associated with business while maintaining service levels. There is a need to examine this situation as organizations take for granted the transition to home work environments and assume that this transition requires no special attention. This assumption is dubious for at least two reasons. First, employees are being thrust into a work environment that may not be of their choosing. Second, they are expected to operate as well as they did in a more structured work situation. These conditions present a pedagogical problem because they lead to at least two key learning challenges. The first challenge is that employees now have to learn a new way of working, and the second is that they must do so in isolation from the larger institution. These pedagogical issues are sufficiently troublesome to warrant



investigation into the learning experiences of a group of employees who are making the transition into a self-directed work environment. Understanding the learning process of these employees can prepare educators and organizational leaders to facilitate better the learning required to make similar transitions and thereby to decrease employee discomfort associated with the transition.

### **Purpose of the Study**

The purpose of the study is to examine how the transition from a traditional office structure to a home office structure affects the learning process of employees as they adapt to the new environment. The results of the study may be used to assist organizational leaders in the selection of appropriate home office employees; assist leaders in determining the learning needs of employees facing a similar transition; and provide a better understanding of the process by which adults learn specific to a self-directed work environment.

### **Questions to Be Answered**

The principal questions for inquiry are:

- What does the learner need to bring to a home office environment to be successful?
- What social structures need to be in place to support learning?

Secondary questions that assist in understanding the principal questions include:

- How has working from a home office affected the work of employees?
- How has working from a home office affected the personal lives of employees?

- What are the characteristics of staff who are successful in a home office environment?
- What are the professional development issues for an effective home office environment?

### **Definitions of Terms**

The following terms are used in the context that was defined by the organization under study.

**Home office:** working from the employee's home.

**Traditional office:** a formal office structure within a particular community funded by the organization under study.

### **Rationale**

This study is a result of a commitment to the reexamination of the home office strategy by CD management. As this is a new strategy for the organization under study, management is committed to addressing concerns specific to a home office work environment to improve the quality of work life for these employees.

Working from a home office environment is becoming increasingly common in contemporary society. This study was undertaken to better understand the impact that home offices have on employees so that employers have a better understanding of and potential home office employees can develop the skills required to be successful in this work environment.

The results of this study can be used to improve the experience of home office environments from both the employees' and the organization's standpoints. The results of this study identify areas of difficulty within a telecommuting work environment and

suggest ways to address the situation. As management is committed to addressing areas of concern for employees, the employees' work environment is expected to improve.

From a management perspective, this study identifies characteristics of employees who are functioning effectively within a telecommuting environment. This information can assist management in developing hiring criteria when replacing staff in home offices. This study also identifies professional development needs of staff. Through the identification of these needs it is expected that the CD Management Team will take steps to meet the needs. The identification of training also leads to a further understanding of the skill requirements for successful home office employees and assists management to further refine the hiring criteria when replacing home office staff.

### **Theoretical Framework**

This study is based on self-directed learning and learning within a social context theory. As there is little literature on self-directed work environments, the application of the theories is within this context. The framework for which the themes arising from the data are discussed examines the interrelationships among the learners, their immediate surroundings, and the social environment in which the learning occurs. Theories of adult learning, self-directed learning, and self-regulated learning are applied within the framework.

The learner is examined with respect to their level of self-identity, creativity, and technical skills; ability to solve problems; and the amount of isolation experienced. The immediate surroundings are discussed with respect to physical environment, work roles, boundaries, and coworker support. Finally, the social environment is explored as it

relates to control, community perception, and supports provided by the organization, family, and technical experts.

### **Importance of the Study**

This study highlights the learning process by which adults learn to adapt to a changing work environment. The study results reveal critical aspects in creating a successful self-directed work climate and strategies for managing the challenges of a self-directed work environment. This study also reveals characteristics of individuals suitable for a self-directed work environment. These findings can assist CD management with recruiting, training, and hiring of future home office staff. As this study is limited in its examination, further studies should be conducted to examine the impact that the new structure has had on the delivery of service to the community as well as the profile of the organization in the community.

### **Scope and Limitations of the Study**

Due to time and resource limitations, this evaluation focused on the effect of the home office experience on staff within CD. This evaluation did not consider cost issues or the impact this restructuring has had on service to the community. These issues should be considered in future studies to fully understand the effect that home offices have had on CD and the way business is conducted.

Qualitative data were collected through interviews with the home office employees. Data were collected until saturation point was reached, which meant the completion of eight interviews. Quantitative data were collected only as they pertained to the demographics and time spent on administrative tasks by the employees.

## **Outline of the Remainder of the Document**

Chapter Two summarizes the literature review focusing on the issues relevant to the transition from a directed to a self-directed work environment. Literature related to adult learning, self-regulated learning, self-directed learning, and learning within a social context was included within the review. The process of learning within a self-directed environment is explored within this chapter.

Chapter Three describes the case study and qualitative methodology used to conduct the study. The chapter discusses the theoretical framework for which the study was designed. A description of data collection, analysis, and reporting procedures is presented.

Chapter Four describes the experiences of 6 women and 2 men as they underwent a transition from a directed to a self-directed work environment. Analysis of the interview data revealed five main themes. The themes are supported by quotes from the participants.

Chapter Five presents a discussion of the findings within a framework of the interrelationships among the learner, the immediate surroundings, and the social environment. Recommendations and implications for practice, theory, and further research are discussed.

## **CHAPTER TWO: REVIEW OF RELATED LITERATURE**

Over the last 3 decades, research in adult education has greatly increased (Brockett & Hiemstra, 1991). Although self-directed learning has been in the literature under various terminologies for many years, it was not until 1971, when Allen Tough published what is considered by some to be a seminal work, that the study of self-directed learning was popularized. It was after Tough's study on adult learning projects that the examination of self-planned and self-directed learning became a specific focus of research. Since that time, the expansion of computer technology, distance education, and home work opportunities created a further need to study and understand the relationship between adult learning and self-directed environments.

The review of literature included journal and book information about the learner, self-directed and self-regulated learning, and the social context in which learning occurs. Various models of adult learning and self-directed learning were included in the literature review as, at the time of the review, there were no studies examining the learning process within a context of home office work environments. It was this gap in literature that led me to examine the learning process that occurred as an individual made the transition from a directed to a self-directed work environment. The present study will contribute to the field of adult education within a context of self-directed work environments. Specifically, this literature is discussed within a context of home offices and provides a framework for the results found in Chapter Four and the discussion in Chapter Five.

### **The Learner**

This section examines the various theories and models that offer an explanation of the learner and the learning process. Definitions of learning are defined first, followed by

a definition of adult education. Next, the various theories and models of adult education are presented. Finally, a discussion is provided of self-regulation and self-directed learning and the implication for a self-directed work environment.

### **Definitions of Learning**

Although there are many definitions of learning, the consistent theme in each of the early definitions seems to be a permanent change in behaviour resulting from practice or experience (Jarvis, 1987). Later definitions expand the view that learning occurs only within a behavioural perspective. For example, Jarvis questioned whether behaviour change is the only indicator that an increase in knowledge has occurred. Both Kolb (1984) and Jarvis (1987) defined learning as a process of transforming experience into knowledge, skills, and attitudes. This expanded definition of learning is applied within this study.

Within the literature, behaviour change is the focus of identified learning in a home office environment. Specifically, skills related to the use of technology are repeatedly cited as a critical element in the effective functioning of home office employees (Craumer & Marshall, 1997; Hawkins, Romano, & Rindfuss, 1997; Olson & Primps, 1984). The reliance on technology for a connection to the parent organization and the lack of administrative support suggests a high degree of proficiency with technology is required for effectiveness within a home office environment. The other two areas of learning, knowledge and attitudes, as identified by Kolb (1984) and Jarvis (1987), are not addressed within the literature.

Further, a variety of definitions of adult education exist within the literature. Tough (1979) uses a broad definition, which is that adults continuously learn through the

experience of learning. Cranton (1992) offers a more deliberate definition by stating, “adult education becomes the set of activities or experiences engaged in by adults which lead to changes in thinking, values, or behaviour” (p. 3). Through the work of Brookfield (1984, 1985, 1986, 1987, 1990), Candy (1991), and Mezirow (1985), there seems to be a movement toward expecting adult learners to take more responsibility for their learning as well as within society and to engage in critical self-reflection as part of the learning process. What this might mean within a home office setting, for example, is that employees are required to identify their learning needs in that context and subsequently to undertake activities to address those needs. These activities can be expected to contribute to an increased sense of responsibility for the adult learner’s effective functioning. This increased responsibility may result in an increase in self-directed learning.

### **Theories and Models of Adult Education**

Since 1926, the field of adult education has borrowed heavily from other disciplines (Knowles, 1980). One of the predominant influences has come from the discipline of psychology. Within this discipline, the behaviourists, humanists, and developmental psychologists had an impact on the practice of adult education.

Skinner (1953), a behaviourist, tried to explain human behaviour as a function of operant conditioning. Operant conditioning is learning where voluntary behaviour is strengthened or weakened by consequences or antecedents. This approach was then used in the development of learning packages where reinforcement is provided at each section within the package. For example, if the behaviour required by students using the learning packages is studying, the reinforcer of the behaviour is testing and grading. These



mechanisms are put into packages to examine whether or not the learner has grasped the concepts of the particular section. The effect of obtaining a good grade is expected to reinforce the behaviour of studying. The application of operant conditioning within a telecommuting setting also offers consequences. For example, the attainment of specific work objectives may be reinforced with a promotion or salary increase. The consequence of not meeting the objectives may be job loss.

Developmental psychologists offer additional insights into the process of human growth. They can be divided into two broad categories, those who studied adult development in terms of life-stages (Kohlberg, 1984; Loevinger, 1976; Perry, 1970) and those who studied the life-phases that adults go through during a lifetime (Gould, 1972). From these areas of study came the recognition that adults are most ready to learn when they are at a transition point in their life-phase. Cross (1990) suggested that if adults are both challenged and supported, they could progress toward a higher stage of development. It is, however, recognized that people develop at different rates even though there is a logical progression to their development, and that development takes place gradually (Woolfolk, Winne, & Perry, 2000). This theory suggests that the adaptation to a home office setting will occur at different rates for each person.

Rogers (1951) and Maslow (1968), two humanist psychologists, focused their studies on achieving self-actualization or fulfilling one's potential. Maslow identified three higher level needs as intellectual achievement, aesthetic appreciation, and self-actualization. He believed that when these needs are met, a person's motivation is continuous in the search to become fulfilled. Both Rogers and Maslow emphasized the necessity of creating an atmosphere that is conducive for learning, that fosters

interactions among people, and that places less emphasis on grading and the role of teachers. This admonition is evident in current adult education practice, where a great deal of attention is paid to the environment and comfort of the learner (Brookfield, 1986). This focus on the environment attempts to ensure that the learner's needs are being met, thereby allowing for a greater opportunity to achieve self-actualization. This theory has implications for the type of physical environment in which the learner works in a home setting. Should the environment not meet the learner's basic needs, they would not be as effective learners, as more attention would need to be paid to lower level needs.

Further, Rogers saw the role of adult educators as one of supporting personal growth, encouraging change in self-perception and self-concept, and facilitating the development of self-awareness in the learner (cited in Cranton, 1992, p. 8). Rogers believed that the actualizing tendency was inborn (Rogers & Freiberg, 1994). The role of the educator is then to motivate the students to use their inner resources of a sense of competence, self-esteem, autonomy, and self-actualization. The impact of Rogers's work is most clearly seen in discussions of empowerment of the learner. This concept is embedded in the principles of adult learning. In a home office setting, the educator role, as identified by Rogers (Rogers & Freiberg, 1994), is taken on by the employer. What this may mean within a telecommuting setting is that an emphasis needs to be placed on developing supports that foster the development of the learner's inner resources. These supports may then assist the employee to further develop the competence, self-esteem, and autonomy needed to function successfully within a self-directed office environment.

The inference of theories of adult education suggest that adults can be self-directed in any work situation. Brookfield (1986) contends that the environment and

comfort of the learner are critical in order for the learner to achieve self-actualization and Rogers (cited in Rogers & Freiberg, 1994) identified the importance of supports. The literature however suggests that within home work environments, environment and support available are not the only important factors in successful self-directed work environments. This literature suggests that the nature of the work itself must be considered, as working from a home office is not appropriate for all types of work. Health Canada (1996) offers a model that indicates the type of work appropriate or not appropriate for telework based on who the customer is and the degree of collaboration required within the job. The model suggests that the degree of collaboration required by employees as it relates to customers is critical to successful telework. Positions that require a high degree of collaboration and have external customers are not suited to telework, while positions that require a low degree of collaboration and have external customers are suitable for telework. A good match of the type of work to be performed in a home office environment appears to contribute to the effectiveness of the employee.

### **Mezirow's Theory**

Mezirow (1981) identified three domains of learning: instrumental, communicative, and emancipatory. Instrumental learning is task-oriented problem-solving that is relevant for controlling the environment or other people. Communicative or dialogic learning is attempting to understand what others mean. Emancipatory or self-reflective learning is the way in which we come to understand ourselves. Although adult learning can take place in each of these three domains, his theory of perspective transformation is initially focused on the emancipatory domain.

Mezirow (1985, 1990, 1991) states that emancipatory learning can pertain to both instrumental and communicative learning. He believes that assumptions people have about themselves and the world may be socioculturally, psychologically, or epistemically distorted. He noted that these distortions can be overcome and that overcoming these distortions allows people to develop their meaning schemes (1990, 1991). Through instrumental and communicative learning, the development of meaning schemes occurs. The opportunity for learners to solve problems and to dialogue with others allows the learners to gain greater insights into and understanding of the world and of themselves.

Meaning schemes are defined as specific values and beliefs underlying individuals' argumentations and actions. Meaning perspectives are a set of related meaning schemes that more generally offer a view, philosophy, or rationale that guides individuals in their daily lives. Mezirow (1985, 1991) considers meaning perspectives to be the most essential learning in adulthood; thus, the issue of self-reflection in adult learning is seen as a central concept in learning. Further, it is through the process of critical self-reflections that an individual's meaning perspective is reformulated (Cranton, 1992). The reformulation and transformation are not complete without the learner ultimately acting on the basis of the learning. Mezirow (1990) suggests that transformative learning may occur as a result of a life crisis. A life crisis may be a change of job, retirement, death of a spouse, a move, divorce, or a move into a home office. The transition from a directed to a self-directed work environment, for some individuals, might be viewed as a life crisis, and Mezirow's theory would suggest that transformative learning would occur.

The move from a directed to a self-directed work environment can be extremely challenging for some adults. This crisis situation may act as a catalyst for learning. The learning that adults in home office situations might participate in potentially involves each of the domains of learning as described by Mezirow. Instrumental learning may be seen as individuals are required to address challenges with the use of technology, as only electronic or distance support systems may be available. Communicative learning may occur in finding new ways to communicate with peers. For example, one frequent strategy for communication with others is through E-mail. Ensuring that the intention of the written word is the perception of the read word may require a new set of skills to ensure fewer misunderstandings. Finally, emancipatory learning may occur as employees learn more about themselves. Working within a self-directed work environment might cause employees to examine their ability to solve problems and the way in which they prefer to communicate with others. This examination could provide an opportunity for employees to learn more about themselves and their work style.

### **Andragogical Model**

It was from the humanist tradition that Malcolm Knowles (1984a) developed the andragogy concept. Knowles (1980) defined andragogy originally as the art and science of helping adults learn, in contrast to pedagogy, which is the art and science of teaching children. He later refined his dichotomous definition and considered pedagogy and andragogy as the two ends of a continuum.

Andragogy, which is essentially humanistic in nature, is based on five assumptions (Knowles, 1984b). First, Knowles assumes that an adult's self-concept is different from that of the child. He argues that the psychological definition of an adult is

“one who has arrived at a self-concept of being responsible for one’s own life, of being self-directing” (p. 9). Knowles suggests that if educators treat adults as children, a conflict with adults wanting to be self-directing will occur. It is this conflict that will detract from the adult’s ability to learn.

Second, Knowles assumes that adults have a reservoir of experience that they can bring to their learning. He suggests that this wealth of experience positions adult learners as one of the richest resources for their peers. As a result, he encourages group discussion, problem-solving experiences, field experiences, and other interactive strategies that make use of the experiences of the learners.

Third, Knowles’ model assumes that adults are ready to learn as a result of their developmental point. He states that adults become ready to learn when they need to know something in order to function effectively in their lives. Often, sources of readiness to learn are related to developmental tasks such as a change in job, a birth of a child, or a change in residence.

Fourth, Knowles assumes that adults have a problem-centred approach to learning. This assumption states that adults’ motivation to learn about their life situation gives them a task-centred or problem-centred orientation to learning. This assumption implies that it is important to ensure the learning experience is relevant to the problem that needs to be addressed.

The fifth and final assumption made by Knowles is that adults are more strongly motivated to learn by internal factors than by external ones. The model does acknowledge that external motivators such as a better job or a salary increase will

motivate adults, but it argues that the internal factors such as self-esteem, recognition, greater self-confidence, and self-actualization offer the greater motivation.

The andragogy model suggests that individuals can be assisted to become increasingly self-directed when given appropriate learning tools, resources, experiences, and encouragement (Brockett & Hiemstra, 1991). This model has the underlying assumption that self-directed learning is the ultimate goal for adult learners. Applying this model to a self-directed work environment implies that employees require the appropriate resources available to them in order for self-directed learning to be facilitated. For example, the employees would require technical support and resources and human support, which may be in the form of family, peer, or employer, to become increasingly self-directed.

### **Tough's Theory**

Allan Tough's work (1971) ushered in an emphasis on the concept of self-planned learning. Although self-teaching implies a degree of independence or autonomy, Tough found that the learning that occurs through self-teaching does not generally take place in isolation. Tough noted, for example, that those individuals who engage in self-teaching are highly likely to seek the assistance of others (Tough, 1979). He further found that most learning projects are motivated by some anticipated use or application of what has been learned. In 1982 he expanded his focus to examine intentional change. He found that 75% of the changes reported by interviewees fell into four areas: job, career, and training; human relationships, emotions, and self-perception; enjoyable activities; and changes in residence location. With respect to taking responsibility for change, he found that the learner assumed about 70% of the responsibility for all tasks related to the

change. In a self-directed work environment, the primary responsibility for learning lies with the employee. What this may mean within a telecommuting environment is that the employee is required to take the primary responsibility for tasks related to the effective operation of their office; however, through dialogue with other employees, the responsibility for learning may be shared with colleagues. The employer may facilitate this dialogue through formal support mechanisms, or the employee may engage in dialogue through informal systems.

The development of mechanisms to support dialogue may help to reduce the impact of isolation that may occur within a self-directed work environment as well as assist with learning. In the literature, there are two important issues as they relate to employee isolation: career marginalization and loss of social contact. Some authors suggest that a home work arrangement creates an “out of sight, out of mind” mentality for employers, thereby decreasing opportunities for career advancement and increasing the social isolation for these individuals (Geake, 1993; Hawkins et al., 1997; Health Canada, 1996; Public Service Alliance of Canada, 1996). What this may mean to a self-directed work environment is that employees may need to become more resourceful in finding ways to increase their social contacts and viability within the organization. Tough’s theory suggests that it will be important to ensure mechanisms are available for home office employees to discuss their experience with others as an aspect of the self-teaching process. Ensuring that this mechanism is available to employees will also assist employees to address the loss of social contact and isolation.



## **Self-Regulated Learning**

Literature on self-regulated learning argues that, for learning to continue independently, learners must have a combination of academic learning skills and self-control so that they can maintain their motivation (Woolfolk, Winne, & Perry 2000). McCombs and Marzano (1990) termed this as learners having both the skill and the will to learn. According to Woolfolk et al., there are three factors that influence skill and will: knowledge, motivation, and self-discipline or volition.

According to the Woolfolk et al., (2000) theory, learners need to have knowledge on several levels. The first factor is knowledge about themselves, the subject, the task, strategies to learn, and the contexts in which they will apply their learning. Having insight into how they learn best allows learners to determine which learning strategies would be most effective for them. Having knowledge about strategies to learn suggests that the learners are then better able to cope with challenges they may face within the context of the task itself. Having base subject knowledge and understanding of the task itself decreases the chance that the learners will become too overwhelmed by the magnitude of the learning task and give up. Finally, understanding the context in which the learning will be applied allows the learners to link the current learning objectives with future accomplishments.

The second factor in self-regulation is motivation (Woolfolk et al., 2000). Similar to other theories within the adult education literature (e.g., Brookfield, 1985; Candy, 1991; Knowles, 1980; Rogers, 1983), the second factor is based on the assumption that self-regulated learners are motivated to learn. From that standpoint, it is the process of learning and the end result of knowledge that motivate the learner (Woolfolk et al.,

2000). The learners know why they are doing something, so their actions become self-determined. Motivation, however, does not necessarily translate into action. According to this theory, with motivation comes commitment and with volition, the third factor, comes follow-through.

Another word for volition is willpower. According to Corno (1992, 1995), self-regulated learners know how to protect themselves from distractions. They know how to cope when they feel anxious, drowsy, or lazy, and they know what to do when tempted to stop working and take a nap. Volition may be particularly important for home office employees, as there would be many distractions that they would face both during and following work hours. Within the work day, personal distractions would exist perhaps with family or commitments, and after hours, the distraction of unfinished tasks may exist.

Volition is also important in establishing and maintaining boundaries between home and work environments. For example, when employees first begin working at home, some individuals are forced to renegotiate the boundaries between work and family (Health Canada, 1996). Many authors cite a work-family conflict for employees (Beach, 1987; Boland-Ahrentzen, 1990; Bolger, DeLongis, Kessler, & Wethington, 1989; Greenhaus & Beutell, 1985; Hawkins et al., 1997; Jackson, Zedeck, & Summers, 1985). The establishment of boundaries between work and family time may be a mechanism to address a major issue affecting employees. Ensuring that employees have the ability to plan strategies to develop boundaries will be critical to the success of a home office experience.

## **Self-Directed Learning**

Self-directed learning has many similarities to self-regulated learning.

Similarities exist between connotations of autonomy, independence, and isolation. These similarities make it easy to envision the self-directed learner as one who pursues learning with a minimum of assistance from external sources. The minimal assistance from external sources suggests that individual control over learning is a distinctive characteristic of self-directed learning (Brookfield, 1985; Freire, 1970).

There are many definitions of self-directed learning (Brookfield, 1985; Cranton, 1992; Knowles, 1975). They each describe self-directed learning as a process whereby the learner takes the initiative to seek out new knowledge. Cranton (1992) defines self-directed learning as

the process of voluntarily engaging in a learning experience, being free to think or act as an individual during that experience, being free to reflect on that experience, and being able to discern change or growth as a result of the experience, regardless of the setting in which it occurs. (p. 56)

Cyril Houle, Allen Tough, Malcolm Knowles, and Stephen Brookfield (cited in Jarvis, Holford, & Griffin, 1998, p. 78) are four theorists whose work has helped to form the concept of self-directed learning. Houle (1961) developed the concept of independent study on the part of learning-oriented adults. He drew attention to the considerable number of people whose motivation to learn is intrinsic and who learn for reasons of personal growth and development. Tough (1971) further developed the concept of adult independent study by examining adult learning projects. His research drew attention to the ways in which adults learn independently of teachers and formal education

institutions. Further examining how adults learn, Knowles (1980, 1984a) developed the concept of andragogy as a general theory of adult learning and adult education. Finally, Brookfield (1985) extended Knowles's work and developed a concept of critical thinking. This concept suggests that self-directed learning is inseparable from learning how to achieve a sense of personal meaning in the face of social and cultural pressures to conform to the status quo.

### **Self-Directed Learning as a Process**

Knowles (1984a) describes self-direction as a characteristic of adults, a trait that evolves on the basis of a natural maturation process. He defined self-directed learning as a process in which individuals take the initiative without the help of others in diagnosing their learning needs, formulating goals, identifying human and material resources, and evaluating learning outcomes. (Knowles, 1975, p. 18)

Although there is a growing body of literature on self-directed learning in adult education, very little has been written about the process of becoming self-directed (Cranton, 1992). While it is acknowledged that not all adults are equally self-directed in their learning, it is also acknowledged that different approaches or strategies may be appropriate for different learners. Cranton questions the traditional view of self-directed learning by stating,

the experience of working toward self-directed learning requires, for most adults, a radical change in beliefs and values. Long-held assumptions about the nature of education must be examined, questioned, and revised. In this sense, the process is an example of Mezirow's transformative learning and usually is a complex and painful process. (p. 111)

For adults to become self-directed learners, it is a process (Cranton, 1992; Knowles, 1984a; Maehl, 2000). Taylor (1987) identified four phases and four transition points that are involved in the process of moving toward self-direction. First is disconfirmation, where a discrepancy between expectations and experience occurs. Second is disorientation, where discomfort and confusion, accompanied by a crisis of confidence, occurs. The third is a transitional point, where the problem is identified without blaming self or others. Fourth is a phase of exploration, which is guided by intuition and which leads to insights, confidence, and satisfaction. Fifth is another transition point, where the process is reflected upon. Sixth is a reorientation phase, where major insights provide a new approach to learning the task. Seventh, the final transition point, involves sharing and testing out the new understanding with others. The final phase is that of restoring equilibrium and refining and applying the new perspective and approach.

Chene (1983) further clarified the process of self-directed learning by distinguishing between self-directed learning as an internal process and as an instructional process. Although these processes have some similarities, Chene argues that they are distinctly different. Chene contends that an internal process is psychological and an instructional process is methodological and assumes that the learner is either autonomous or, through training, is striving to attain autonomy. Brockett and Hiemstra (1991) also examined the relationship between internal and instructional process in self-directed learning through a review of the literature. They argue for a continuum in which individuals will seek and need various amounts of outside assistance, personal initiative, and individual reflections in terms of their learning activities. Although some individuals

may think that self-directed learning takes place in isolation, this is not always the case. These authors suggest that self-direction is a characteristic that exists, to a greater or lesser degree, in all persons and in all learning situations. They argue that self-direction in learning does not necessarily take place without a facilitator or some other outside resource.

Mocker and Spear (1982) offer an alternative way of looking at self-directed learning, which examines internal and external involvement. In a 2x2 matrix based on learner versus institution control over the objective (purpose) and means (processes) of learning, they offer four categories of lifelong learning:

formal where learners have no control over the objectives or means of their learning; non-formal where learners control the objectives but not the means; informal where learners control the means but not the objectives; and self-directed where learners control both the objectives and the means. (p. 19)

This framework indicates that within a self-directed work environment learners control both the objectives and their means of learning. The model also suggests that control over the setting would indicate whether or not learners would be self-directed.

Rogers (1983) sees self-directed learning as a personal process of learning how to learn, how to change, and how to adapt. Cranton (1992) suggests learning is accepting ever-increasing responsibility for decisions associated with the learning process. This view of self-directed learning as a process is presented within a model offered by Cranton. Cranton's model focuses on the learner and the educator. Specifically, the model examines characteristics of the learner and educator, educator and learner processes, and educator and learner change. This model acknowledges that the process

of change occurs within a learning environment that is within a larger social context.

Further, this model suggests that self-direction in learning is a combination of forces both within and outside the individual. However, Cranton's model does not identify key features influencing the learner and the learning process. In a self-directed work environment, the choice (internal) to participate in this type of work environment and the perception of control (external) in the decision may affect an individual's willingness to engage in the self-directed learning process.

Brookfield (1985) suggests that self-directed learning reaches its ultimate fulfillment when

the techniques of self-directed learning are allied with the adult's quest for critical reflection and the creation of personal meaning after due consideration of a full range of alternative value frameworks and action possibilities. (p.15)

This suggests that learners must take responsibility for their own learning process in order for the learning process to have meaning for them. Again the issue of control seems a critical component in the learning process. In self-directed work environments, this issue implies that the learners are the ones who should control the identification of their learning needs in the transition from a directed to a self-directed work environment. The identification of employee-specific learning needs is necessary for the transition to be an individually meaningful learning experience.

### **Personal Responsibility for Learning**

In the last 30 years, there has been a greater emphasis on personal responsibility for learning. With taking more responsibility for learning, individuals develop personal patterns for approaching and solving problems, which will enhance one's confidence and

concept of self as a learner (Brockett & Hiemstra, 1991). In order to have a successful self-directed learning environment, a “learning partnership” must be developed between participants and the teaching-learning situation.

Self-directed learning is a learning process and an aspect of personal development as identified by Brockett and Hiemstra (1991). The authors offer a model for personal responsibility orientation (PRO). It examines the factors of responsibility within a social context. There are five aspects of this model. These aspects are control over the situation, self-directed learning, learner self-direction, self-direction in learning, and social context for self-direction. The personality aspect of self-directed learning is addressed in the model as learner self-direction and centres on a learner’s desire or preference for assuming responsibility of learning. The notion of self-directed learning refers to the traditional approach whereby an education agent or resource plays a facilitating role in this process. The social context within this model encompasses all four other aspects and examines self-direction within the learning process.

More specifically, personal responsibility means a person has control over how to respond in a situation. It is the ability and/or willingness of individuals to take control of their own learning that determines their potential for self-direction. The first aspect of the PRO model envisions personal responsibility as the cornerstone of self-direction in learning. The role for adult educators is to help learners become increasingly able to assume personal responsibility for their own learning. This cornerstone also implies that the primary focus of the learning process is on the individual as opposed to the larger society. Accepting responsibility for one’s actions does not ignore the social context in which the learning takes place. The individual is considered within the social dimensions



that influence the learning process. This model further assumes that the individual takes responsibility for the consequences of the actions taken through the learning process. In summary, personal responsibility means that learners have choices about the directions they pursue as learners.

Along with this is an acceptance of the consequences of one's thoughts and actions as a learner. A second aspect of the PRO model is self-directed learning, the process orientation. This second aspect of the model, self-directed learning, is an instructional method. It is a process that centres on the activities of planning, implementing, and evaluating learning. Needs assessments, evaluation, learning resources, facilitator roles, and skills, and independent study are a few of the concepts that fall within the domain of the self-directed learning process. Brockett and Hiemstra (1991) suggest that one may think of the process of orientation as self-directed education.

A third aspect of the PRO model is learner self-direction: the personal orientation. This aspect of the model considers the personality characteristics of the learner and factors internal to the individual. It refers to characteristics of an individual that predispose one toward taking primary responsibility for personal learning endeavors.

Self-direction in learning is a fourth aspect of the PRO model. Through the concept of personal responsibility, there is a strong connection between self-directed learning and learner self-direction. The connection provides a key to understanding the success of self-direction in a given learning context. This suggests that optimal conditions for learning result when there is a balance between the learner's level of self-direction and the extent to which an opportunity for self-directed learning is possible in a given situation. When considering the fit between self-directed learning and learner self-

direction, it is important to keep in mind that the congruence between these dimensions may be mitigated by factors such as the expectations of the learners.

The final aspect of the model, social context for self-direction in learning, encompasses each of the previous four aspects. This aspect addresses the criticism of other models of self-directed learning that there is an overemphasis on the individual. The consideration of the social context in which the learning occurs is critical to understanding self-direction (Brockett & Hiemstra, 1991; Brookfield, 1984). In the PRO model the learner is central; however, this model argues that learning activities cannot be understood without examining the context in which they occur. By examining the environment, this model also takes into consideration the political climate within which the learning is occurring.

### **Social Context**

Sociocultural theory emphasizes the role of cooperative dialogues between children and more knowledgeable members of society (Woolfolk et al., 2000). Vygotsky (1986, 1993) suggested that children's cognitive development depended on the interactions with people and the tools that the culture provided to support the child's thinking. Vygotsky believed that language in the form of self-talk or reflection guides cognitive development. Although Vygotsky's research was with children, it has some similarities to Brookfield's (1984) assertion that critical reflection and dialogue are required for learning to occur.

Critical reflection and dialogue must also be considered within the social context. Jarvis et al. (1998) believe individuals learn both from and alongside other people in all social relationships. In other words, they argue that all learning takes place in a social or

cultural context. They argue that supportive social relations, whether in the classroom, family, or workplace, are significant factors in the motivation to learn.

Sociological functionalism, a model of social learning coming from the field of sociology, examines how individuals learn to be members of society. This model suggests that learning occurs in several ways:

First, societies have to learn functional adaptation in order to survive in a changing environment. Second, individuals must learn social roles in order to be members of society. Third, failure to learn means that society itself will not survive, and then individuals will come to play deviant or dysfunctional roles.

(Jarvis et al., 1998, p. 39)

In an earlier work, Jarvis (1987) stressed the need not just to include a psychological view of learning but to also consider a sociological perspective on learning:

The position adopted here is that learning is not just a psychological process that happens in splendid isolation from the world in which the learner lives, but that it is intimately related to that world and affected by it. Hence, it is as important to examine the social dimension of adult learning as it is to understand the psychological mechanisms of the learning process. (pp.11-12)

To answer this imperative, Jarvis presents a social theory of learning. The idea of a social self means that all individual learning takes place in an interaction with others in the context of the prevailing beliefs and attitudes that constitute the culture of one's society. This theory does not view learning as a one-way process but as an exchange with the world around the learner.

Everyone is born into a culture with particular knowledge, values, beliefs, and attitudes of the society. According to Jarvis (1987), part of the socialization process is that “as the individual grows and matures within the context of social living, the person becomes, in part, a reflection of the sum total of experiences that the individual has in society” (p. 13). Not only is the person changing as a result of social living, but the cultural milieu is also changing as a result of the person changing.

Jarvis (1987) states that the mind and self are regarded as social constructs. They both emerge from the experiences of everyday life through social interaction. Both are learned and both reflect the life of the learner. Jarvis goes on to say that the self has three main elements in its development: self-image, self-esteem, and the ideal self. The first element, the ideal self, is the image that learners have of themselves and the image to which they think they should conform. The second element, self-image, is described as the impressions that the learners have of themselves. Self-image and social image both affect the way that performance is anticipated. Finally, the third element, self-esteem, is the feelings that the learner has of him or herself. These three aspects of self-concept have a great deal to do with the understanding that people gain from others about themselves.

Brookfield (1985, 1986) states that the learning activities of successful self-directed learners are placed within a social context, and he cites other people as the most important learning resource. The learning resource could be peers and fellow learners who provide information and serve as skill models, reinforce learning, and serve as counselors at times of crisis. Brookfield (1985) argues that successful self-directed learners appear to be highly aware of context in the sense that they place their learning

within a social setting in which the advice, information, and skill modeling provided by other learners are crucial conditions for successful learning. Brookfield also notes that a climate for self-directed learning has the following components: a climate where the individual feels cared for, a climate of mutual respect, a climate conducive to dialogue, a climate in which individuals are clear about and secure in their respective roles, and a climate of mutual trust.

What the importance of climate might mean within a self-directed work environment is that the creation of a climate that promotes self-directed learning may be of increased importance due to the isolation of the employee. Specifically, within a home office environment, issues of trust between managers and the home office employee may be an issue of concern. There needs to be trust established that employees will perform their jobs and not allow distractions to impede their work ability. The employees also need to feel that they are trusted. The issue of identity and self-image may also be a concern for individuals who achieve their sense of self through the visibility within the community and through their job role. With the decrease in visibility and the necessary changes in the way in which the job can now be performed, employees may require additional supports as they reestablish a new sense of identity.

### **Summary**

The purpose of this study was to explore the learning by respondents in their move from a directed work environment (traditional office setting) to a self-directed work environment (home office). This review of literature has assisted in the development of a theoretical framework that will assist in gaining an understanding of the respondents' experiences. Specifically, the complexities of successful functioning within a self-

directed work environment led to an exploration of the literature relating to the adult learner, their immediate environment, and the social context. These elements represent the foundation of the theoretical framework that informs the study reported in this document.

The first element of the theoretical framework, which deals with the adult learner, has received the most attention in the existing literature on adult education. Cranton (1992) for example defined adult education as the “set of activities and experiences engaged in by adults which lead to changes in thinking, values or behaviour” (p.13). Several theories of adult education were explored. Skinner (1953) offered a behaviouralist view on learning, while, Rogers and Maslow, offered a humanist perspective on learning.

Knowles (1980), Mezirow (1981), Brookfield (1985), and Brockett and Hiemstra (1991) discussed the second element of the theoretical framework, the immediate environment. These theorists offered a perspective that assisted in the understanding of the respondents’ experiences. The andragogical model offered by Knowles (1980) examines the art and science of helping adults learn. It is with this model that the structures and supports offered to the respondents will be explored. A second theorist, Mezirow (1981), offered the transformative learning theory that explores the learning that takes place as a result of a life crisis. An examination of the learning climate by the third theorist, Brookfield (1985), led to an exploration of the self-directed learning literature. Finally, Brockett and Hiemstra (1991) offer a model of personal responsibility for learning. The role that personal responsibility plays within a self-directed work environment was explored in relation to the learning process. The sharing of

responsibility for learning is explored within this study. Although self-directed learning has been associated with isolation, autonomy, and independence, the literature review expanded on this impression to examine the various ways that self-directed learning and self-regulated learning occur, as well as the context in which the learning occurs.

The third element of the theoretical framework is the social context in which learning occurs. The social context literature explored relationship between the learner and the environment around them. Life experience was identified as an important aspect of personal development and personal development as an aspect of self-directed learning. Jarvis et al. (1998) argue that all learning takes place in a social or cultural context. The importance of a climate that supports the learner and creates opportunities for peer interaction to facilitate and reinforce the learning process was identified.

### **CHAPTER THREE: METHODOLOGY AND PROCEDURES**

This chapter describes the methodology used to conduct this study. The chapter offers a description and rationale for the selection of qualitative research methodology. A description of the participants selected for the study is provided in a matrix. Data collection and analysis are discussed. Further, the assumptions and limitations of the study are provided.

#### **Description of Research Methodology**

This study used a case study design and qualitative methodology. Case study design was selected as the most appropriate methodology given that under study was a contemporary set of events over which there was no investigator control. Yin (1994) defines a case study as

an empirical inquiry that investigates a contemporary phenomenon within its real-life context. This methodology is especially useful when the boundaries between phenomenon and context are not clearly evident. A case study copes with the technically distinctive situation in which there will be many more variables of interest than data points. As one result relies on multiple sources of evidence, with data needing to converge in a triangulating fashion, another result benefits from the prior development of theoretical propositions to guide data collection and analysis. (p. 13)

Case study methodology was chosen as there was no investigator control over the events and the study focused on a contemporary phenomenon within a real-life context. This methodology allows for the investigation to retain the “holistic and meaningful characteristics of real-life events” (Yin, 1994, p.3) while trying to understand the



complex social phenomena. The phenomenon under investigation with this case was the experience of participants who had worked within a home office setting for approximately one year.

### **Selection of Participants**

The study participants were selected based on a matrix outlining various characteristics of employees (see Table 1). The “x” indicates that a home office employee within the organization meets the specific characteristic. Participants were selected with a range of service with the organization. Participants were categorized into those staff who had greater than 10 years or greater and nine years or less of service. Most home office staffs were employed less than 5 years or greater than 10 years. There was no male home office staff employed less than 10 years. A second characteristic considered was the distance to the nearest traditional office. Participants were selected with a range of distances to the nearest traditional office. Distances ranged from a 15-minute drive to a three-hour drive. Most participants were two hours from the nearest traditional office. A third characteristic by which participants were selected was the area of the province in which the employee resided. There were no home office employees in northern Ontario and only female home office employees in western Ontario. The fourth characteristic considered was whether or not the participant had children. Participants selected either had no children, children living at home, or children but they were not living at home.

Participants were selected such that all the characteristics on the matrix were included in the pool of participants. Some participants selected met one or more criteria. As there were more females than males working for the organization and in a home

Table 1

## A Matrix of Characteristics of Employees for Selection

Characteristic	Male	Female
Years of service:		
< 10 years	x	x
> 9 years		x
Distance from traditional office:		
< 30 minutes		x
> 1 hour	x	x
Location:		
Eastern Ontario	x	x
Central Ontario	x	x
Western Ontario		x
Children:		
None		x
Children living at home	x	x
No children living at home	x	x

office, there was a greater percentage of females interviewed. An initial assessment indicated that a cadre of 5 participants met the selection criteria. However, to ensure that variations in experiences were addressed, 8 participants were interviewed, 2 males and 6 females.

Employees who were working in offices within agencies but still considered home office employees by the organization were excluded from this study. These employees were excluded as their work environment was similar to that of a traditional office. The selected participants were contacted via telephone. One former staff member who had been in a home office but had since left the organization was contacted. The former staff offered further insights into the effects of a self-directed work environment with less restriction in voicing personal experiences, because this individual no longer was employed by the organization. The study was described to the participants and they were invited to participate. Once verbal agreement to participate was received, an appointment was made with the employee for a mutually convenient time and location for the interview. Informed consent (see Appendix B) was reviewed and signed at the time of the interview.

### **Instrumentation**

Participants were asked a series of 25 questions from the following categories: demographics, work routines, general effects, skills and training, benefits and disadvantages, choice, support, and staffing. The interview followed a semi-structured format. The interview schedule can be found in Appendix C.

### **Data Collection and Recording**

Personal in-depth interviews were conducted with selected employees at their office locations. No employee refused to participate in this study. The interviews were tape-recorded, and personal observations were recorded in a journal during and following the interviews. The length of interviews ranged from 1 hour to 3 hours. Observations included work space lighting, space available, ergonomics, location within the home, and presence of the organization's home office reference manual.

### **Data Processing and Analysis**

The interview tapes were transcribed by a paid transcriber and checked for accuracy by both the participants and me. The data were first organized into the following descriptive categories: administrative support, benefits of a home office, boundaries, challenges of a home office, community relationships, computer training, differences between hub and home offices, isolation, options and control, organizational visibility, perceptions of how well home offices were working, personal life, psychological preparation, routine, self-discipline, sick time, skill development, skills for a new person, strategies, the move, transition, trust, type of work done, and work productivity. These categories were selected based on common issues raised by the participants.

An inductive analysis then was conducted to examine themes that arose from the issues identified by the participants. The data were organized into the following themes: impacts, supports, personal development, boundaries, and skills and attributes. Within the larger themes, the data were organized within the following subcategories. Impacts were subdivided to examine personal, role, skill set, productivity, and physical

environment. Within the large category of supports, subcategories of organizational, family, and administrative supports were established. The third large theme of personal development was subdivided to examine learning needs and personal skills. The theme of boundaries was divided into family and work. The final theme addressed future staffing concerns and identified skills, attributes, and orientation requirements of new home office employees.

### **Methodological Assumptions**

It was assumed that the transition to a home office environment was affected both positively and negatively by the skills the employee brought to the situation, the organizational and family context, the nature of the work being done by participants, the training needs of home office staff, the employee's personal life, and some employees' decision to leave the organization.

As a member of the organization under study, I was able to place meanings of experiences within an appropriate context. That is, I was able to differentiate between effects that resulted from the move to a home office and the effects that were a result of other organizational changes.

### **Limitations of Study**

The study was limited in the following ways:

- It examined only a small sample of employees who moved to a home office and may not reflect the experience of all those in the organization.
- Learning style and personality type were not examined and may have given further insight into understanding individual experiences.

- The recollection of the employee who had left the organization may not be completely accurate.
- The interviews took place at approximately one year following the transition to a home office. This time delay may have resulted in inaccurate recollection.
- The transition into a home office occurred at a time when several changes were occurring within the organization. The number of changes that were occurring at that time may magnify the impacts on the employees.
- As a member of the organization under study, I may insert biases in interpretation of the data.
- During the data interpretation period, I moved into a home office.

### **Establishing Credibility**

To enhance the credibility of the data, two strategies were undertaken. First, member checking was used. The interview transcriptions were given to the interviewees to review for accuracy. Aspects of the report that used information provided by an individual were sent to that person to review to ensure anonymity and accuracy of interpretation. The interview transcripts and aspects of the report were sent via confidential courier to the participants. The participants indicated confirmation of accuracy and anonymity via confidential courier, fax, or E-mail. Second, triangulation was used to increase confidence in the data by gathering data from multiple sources: observation and interview.

### **Ethical Considerations**

Participation in this study was voluntary, and participants had the right to withdraw at any time without penalty. All participants had the purpose of the study

clearly explained to them, and each one signed an informed consent form agreeing to participate in this study prior to the start of the interview. A copy of the informed consent is provided in Appendix B.

The following steps were taken to ensure the anonymity of the participants and confidentiality of responses:

- Only the Vice-President of the Division and the researcher knew the names of the participants.
- Interviews were conducted within the home office of the employee.
- The tapes were transcribed by an individual contracted from outside of the organization.
- The tapes are stored in a locked filing cabinet within my home and will be destroyed upon completion of this thesis and report to the organization.
- Data were reported on an aggregate level.
- Aspects of the report referring to a participant's interview were approved by the participant prior to preparation of the final report.

Undue inconvenience to participants was not expected or experienced. It was anticipated that the time commitment of participants would be approximately 2 hours of interview time and approximately 2 hours to review transcripts and aspects of the final report that pertain to them. These estimates were accurate for most participants. Two participants had an interview lasting 3 hours.

A copy of the approval for this study by Brock University Ethics Board can be found in Appendix A.

### **Restatement of the Problem**

There is limited research available to understand the learning process required by employees who are making the transition to self-directed work environments.

Consequently, this study was undertaken to gain insights into the learning process and required learner attributes so as to understand the supports needed to facilitate a successful transition.

### **Summary**

Six women and 2 men were interviewed to determine their experience of moving from a directed work environment into a self-directed work environment, the skills and resources they brought to the home office, and the social context in which the transition occurred. Each interview was taped, transcribed, and reviewed. The analysis of the data was within a framework of self-directed and social learning theory.



## **CHAPTER FOUR: RESEARCH FINDINGS**

The purpose of this study was to examine how the transition from a traditional office structure to a home office structure affected the learning process of employees as they adapted to the new environment. Qualitative data were collected through observations and interviews with 8 home office employees. This chapter presents the themes that emerged from the data. To provide a better understanding of each participant, this chapter begins with a description of each respondent's work environment and years of employment with the organization studied. Each participant has been given a fictitious name to protect confidentiality. Five main theme areas emerged from the data. First, the impacts of the self-directed environment on the respondents' personal lives, their roles, skill set, productivity, and the physical environment are presented. Second, the support that was offered by the organization, family, and office administration is reported. Third, the personal development of the respondents specific to their learning needs and personal skills are presented. Fourth, boundaries as they relate to family and work are noted. Fifth, skill set and orientation requirements as perceived by the participants are identified.

### **Participant Descriptions**

Six women and 2 men were interviewed, with each interview lasting between 1.5 and 3 hours in length. The participants each came from the organization under study. They were selected using the matrix described in Chapter Three. The criteria used in participant selection included gender, years of service, distance from the nearest traditional office, employment status (i.e., full time or part time), the area of the province where they resided, and whether or not there were children living at home. These participants ranged in experience from 3 years with the organization to almost 17 years.

At the time of the interviews, the participants had spent between 5 months and 14 months in their home offices. One participant who was interviewed had left the organization after 6 months in her home office.

### **Jane**

Jane had been employed by the organization for 3 years and had been in her home office for 5 months. She met me at her front door and, after I greeted her pets, she brought me upstairs to her office. She had already been out to Tim Horton's to pick up coffee and muffins for us to enjoy while we conducted the interview. The office was a converted bedroom that was newly decorated. Jane had explained that she specifically redecorated the room when she found out she would be moving into her home office. The room was bathed in natural light, with both a large window and a skylight. The walls were a soft green complemented by walnut-stained hardwood floors. The room was furnished with newly purchased matching cherrywood L-shaped desk, ergonomic chair, filing cabinet, and bookcase. The bookcase held copies of the organization's resources and a copy of the home office manual. In one corner was a guitar and a wing-backed chair in a green, diamond-shaped pattern which complemented the wall color. Plants and family pictures accented the room and gave it a comfortable, welcoming feeling.

Jane's desk faced the window that overlooked neighborhood rooftops and cedar trees. Jane explained that she went shopping for the matching new furniture and that the organization paid for the purchase. She had two phone lines installed into the office. One was for her business phone and the second line was shared between the fax machine and the Internet. Her business phone was a portable one. Adequate wiring in the house was not an issue for her.

**Julie**

Julie had been an employee with the organization for 16 years and had been in a home office for one year and in her present location for 10 months. This was her second home office location in that year. She greeted me at the door and offered to make coffee. While the coffee was percolating, we chatted and she offered me a tour of her new home. With our coffee, we went down to her office in the basement. The office space was a small section of the laundry area. It was an unfinished room with a cement floor. An old, worn area rug was underneath Julie's work area. Above the washer and dryer, the fuse panel was exposed. Patio doors offered the room's only natural light. The vertical blinds were drawn. The room had a cold dampness to it.

In Julie's cramped work space was a 1950s style wooden desk that had its leg repaired several times and was covered with stacks of files. It was a desk that was taken from the old office when it was closed. The space had two small filing cabinets that belonged to Julie. One cabinet was broken and did not close "thanks to the organization's heavy files," according to Julie. There was also a computer desk that overflowed with stacks of files. Boxes of unpacked materials were stacked on the floor by the window.

Two lines were installed into the house for business purposes. Julie described how she had to crawl underneath her desk to unplug the fax machine and plug in the computer when she needed to check her E-mail. Julie did not have a portable phone.

**Jennifer**

Jennifer greeted me at her home with coffee prepared. Before heading to her attic office, I was introduced to her husband, who was on his way to work. Upon entering the

third floor office space, I noticed how the colors throughout the house were carried into the office. Jennifer had had a professional designer consult with her when she and her husband first bought the house. She wanted to create a warm, welcoming feeling throughout her home. Jennifer had worked for the organization for 4½ years. She had been in her home office for “about one year and a few weeks.” She could remember the exact date of the transition.

The office was a large, spacious room with two nooks. In one nook, Jennifer had installed a window air conditioner. She was required to have the wiring upgraded to accommodate the computer equipment and the air conditioning unit. She had both a floor space heater and a fan in the room for added warmth when needed and for air circulation in the summer. Two phone lines were installed, one for the phone and a second to share between the computer and the fax machine.

The desk was in the second nook. It was near the second window, which offered lots of natural light. A bulletin board above the desk was covered with notes. The desk was the metal one that came from the old office. A portable phone was on the desk. There was a computer desk beside the main desk and two filing cabinets in the room. In the main part of the room, two small bookcases held several of the organization’s resources and reference materials. There was also a small couch, reading lamp, and wing-backed chair.

### **Jeris**

At the time of the interview, Jeris was no longer working for the organization. She had been with the organization for approximately 6½ years. She had been in her

home office for about 6 months prior to her departure. As she no longer lived in the location that had been her home office, I had her describe it to me.

Jeris had lived in a two-bedroom apartment. She converted one of the bedrooms into her office and decorated it differently from the rest of the house. She said she had purposely made it “look and feel” different than her living space so that when she was in there it was an office environment. The room had a window that opened, which was important to Jeris. Her desk was set up in an L shape. In one corner of the room was a five-drawer filing cabinet and fax machine. There was also a spare chair. A sign with the company name on the door helped her to differentiate between work space and personal living space.

### **Tracey**

Tracey had worked for the organization for the past 16½ years. At the time of the interview, she had been in her home office for 14 months. With coffee in hand, Tracey offered me a tour of her converted bedroom office. The room was cluttered with stacks of papers and files on every piece of furniture. She mentioned that she had not had time before setting up her office to repaint as she wanted. She also mentioned that she needed to have an extra outlet installed in the room and should have had the wiring upgraded, but she did not think the organization would pay for it to be done so she was just “making do.” Two phone lines had been installed in her home.

The room itself had natural light but was not bright. The walls were painted a pale gray color. The desk faced the window that looked out to open fields. On the desk was a portable phone. The room contained a desk, computer desk, and bookshelf, all of which came from the old office. A filing cabinet in the corner had come from the

traditional office. A couch that she owned was against one wall. Family pictures were displayed around the room. The home office manual was on the shelf of the bookcase.

### **Bob**

Bob lived in a brightly lit house with lots of windows. He was clearly proud of his home and described it to me in detail without offering a tour. He had converted a room on the main floor into his office. Bob described the process of getting the room ready for his office. He had taken a great deal of time to select the correct color and rug for the room because he would be spending a lot of time in it and he wanted it “just right.”

Bob had worked for the organization for “16 and  $\frac{3}{4}$  big ones” and had been in his home office for just over a year. His office contained a desk, table, computer desk, and filing cabinet. All the furniture came from the old office. The desk facing the window offered some natural light, but the room was quite dark. A portable phone was on the desk. The room itself was fairly spacious, with the walls painted a pale green and with a small area rug on the floor. The room was clean and ordered. Pictures were hung on the walls and provided a warm feeling to the room. Two phone lines had been installed.

### **Melissa**

Melissa greeted me at the door and immediately offered me coffee. We went downstairs to her family room where part of it had been sectioned off with a partition to form her office. In preparation for the office move, Melissa had redecorated the family room in warm green colors with both paint and wallpaper. Melissa had been working for the organization part time for the past 3 years and had been in her home office for 1 year.

Her family room was L shaped, and in the smaller section was her office. She had brought a divider, chair, and filing cabinet from the old office when it was closed. The organization purchased a new desk and bookshelf that “would be visually compatible” with the rest of the room. The work space was bright, with natural light coming in from a window above her desk. The space was cluttered with files and books. Melissa reported that she was a “packrat” who did not like to throw anything away, so she struggled with having the smaller space.

### **Dave**

Dave’s interview began with his leading me to the kitchen and making coffee for us. While the coffee was percolating, I asked to see his office, which was a converted upstairs bedroom. It was brightly lit, with natural light coming from two large windows. The walls were painted pale blue, and the floor was covered with a pale gray carpet. The office furniture consisted of a desk, computer desk, filing cabinet, and shelving on one wall. The furniture came from the old office. The office was organized and clean. The desk held a portable phone. Two phone lines were installed into the room.

As we returned to the kitchen to prepare our coffee, Dave told me he had worked with the organization for 19 years and had been in the home office for a year and 1 month.

### **Impacts**

Participants, in several ways, reported feeling the effects of the transition to a self-directed work environment. The purpose of this section is to describe the impacts that being in a home office had on the participants’ personal and family lives, their work

lives, the support they received both organizationally and personally, and the personal development they experienced as a result of moving to a home office.

### **Personal**

Most home office staff mentioned the sense of loss resulting from secretarial colleagues being terminated and the office being closed. As Julie stated, “It wasn’t just the support staff losing their jobs, but it was everybody losing their colleagues and their friends” (Julie, p. 11). It was interesting to note that the female participants reported a greater sense of loss than the male participants.

The one individual who had left the organization and a second who has since left the organization reported experiencing isolation to a greater degree than the others. They also reported a lot of personal change during the time of the transition to a home office. Jeris described how isolation affected her as a result of her living situation.

I wouldn’t work in a home office if I were living alone again, because to me it can become too isolating. The social contacts at work are beneficial for keeping balanced when you’re living alone. A concern that I would have for other people who are living alone and working in a home office would be that they wouldn’t have a balanced life. They would have to recognize their limitations and their tolerance for isolation and they would have to strategize around it so they keep themselves healthy because that’s really important. (Jeris, p. 7)

Five participants specifically mentioned that prior to moving to a home office the issue of isolation was a great concern for them as a result of self-knowledge and fear of the unknown. For Jeris, the degree to which isolation affected her was a surprise. She



reported, “the isolation factor I really realized was an issue for me, more than I expected it to be because I do like my time alone” (Jeris, p. 6).

Through this experience, participants reported learning more about themselves and what they could tolerate with respect to the isolation. As participants learned more about themselves, they put strategies into place to ensure their social needs were met.

Dave stated,

In my experience, I really couldn’t see myself physically having to be here in the office all the time. For me, it just wouldn’t be a good arrangement. I just don’t like being away from people and having to work in this situation all the time. I like to be out doing different things and working with people. I’d feel penned in if I were here all the time. (Dave, p. 16)

Tracey, Bob, Dave, Jeris, and Julie discussed feeling isolated from the organization. They reported that since working in a home office they felt more removed from the organization than they did before. Bob and Tracey mentioned that since they moved into a home office they had stopped receiving some of the communications from the head office. This further contributed to a sense of isolation and, as Tracey described, “a feeling of being a second-class citizen” (Tracey, p. 7). Bob referred to a dialogue he had with the marketing department at head office and echoed a similar sentiment as Tracey.

The way she was talking to me was as if we [home office employees] were second-class citizens who didn’t quite count. I had to remind her that we *were* an office and that I am to receive copies of documents just like every other office.

(Bob, p. 15)

Dave referred to how he felt left on his own by stating,

At first there was a real sense of being almost *lost* but I think gradually you adjust to that. There was a period with the initial change that I thought that we're really being left out here on our own. (Dave, p.15)

Julie echoed Dave's experience by stating, "I could always call whomever I needed to for help but it's a constant feeling of being out there on your own" (Julie, p. 18). Tracey reported that one of the disadvantages to being in a home office was the isolation from social contact and networking.

The isolation from keeping up to date on what may be nothing more than office gossip, it's what helps you feel like you're connected to the organization. To some extent, I guess I feel a little less connected to the organization. (Tracey, p. 17)

Both Tracey and Jeris reported that they had felt alone when they first moved into their home offices.

When I got in here, I felt like I'd been abandoned by the organization. I was sitting here by myself. Nobody even called to see if I was alive. It was like no one cared. It was like the organization said get out, close the office, save us money, and goodbye. (Tracey, p. 6)

Jennifer, Tracey, and Jeris each mentioned not feeling welcomed when they went to the nearest traditional office. They each made reference to not having a space of their own to work or to hang their coat when they were there. Melissa reported that she felt somewhat uneasy with the office protocol, but otherwise comfortable.

I really didn't know what the protocol was if I want to talk to somebody behind the baffle. Did you walk around and knock on their baffle? Did you stick your head around? If they were there, did that mean they didn't want to be disturbed? I did however feel comfortable going into the supply room and taking what I needed. The people always made me feel welcome. (Melissa, p. 26)

The feeling of isolation that was experienced by the participants was felt on four levels. Participants reported feeling isolated from peers, colleagues, the organization, and the traditional office to which they were assigned. The impacts that isolation had on the participants was both positive and negative, indicating that a learning curve was required in order for a comfort level to be obtained. Some of the more positive impacts emerged in relation to family members and the participants' personal lives. These impacts are discussed in the section below.

### **Family**

Two participants lived alone and did not report any impacts on their family life. Two participants did not have any children, while one had a child living elsewhere. Two of the participants had school-aged children living with them, 1 had adult children living on their own, and 2 had adult children living with them. The participants with family living with them reported both positive and negative impacts. Positive impacts focused primarily on parenting. They included being home when the children were ill, being home after school when the children came home, being home to enjoy lunch with the children, and having the office computer to use for family purposes.

Jane reported that she had not been ill since moving into her home office. She also reported other positive benefits by saying, "Lifestyle-wise, definitely there are

benefits. I can go out for a run at lunch and sleep a bit longer in the morning because work is only 2 seconds away” (Jane, p. 2). Bob reported that he saved 80 minutes a day in travel time since moving into a home office. This allowed for more personal time. Other positive benefits were the lack of interpersonal conflict and interruptions that sometimes occurred in an office setting. As Jennifer reflected, “I like the absence of any kind of interpersonal conflict that happens in offices. It’s wonderful. You know, there’s a lot of energy now that can be redirected into my work” (Jennifer, p. 13). Dave reported, “It’s more relaxed and quiet and I can concentrate more on what I’m doing; I don’t get interrupted as much” (Dave, p. 14).

Tracey, Jennifer, Bob, Dave, and Jane each made reference to the flexibility that a home office offered as one of the benefits they experienced. Jennifer, for example, stated,

I like the flexibility of changing my time. For example, Monday was a beautiful morning and I took time off and stood on the veranda and talked to my neighbours. Then I worked later in the day. It was nice to be able to do that.  
(Jennifer, p. 13)

The only negative impact mentioned in this category was a loss of family living space. In Julie’s case, for example, the home office was in a location previously used by a family member for entertaining.

Two participants with no children at home reported that their spouse was used as a confidant in a manner similar to that of former colleagues. Tracey reported using her spouse to assist with technical challenges on the computer, and Jennifer reported expressing her frustrations about the technical problems to her spouse.

Those participants with pets reported needing to train their pets to assist them in adjusting to the changing work environment. Those with cats reported that the cats kept them company, and others reported that the pet expected an increased amount of attention and would interfere with their work papers if attention was not forthcoming. Participants with dogs reported having to help the dog adjust to hearing the speakerphone and other voices. They also reported that some adjustments meant getting up earlier in the morning to give an extended walk, depending on the tasks of the day, to ensure that the dog would not disturb them.

The impacts experienced both by family members and personally were both positive and negative. The degree to which family members felt the impacts depended on the participant's personal situation and learning needs. The next area for consideration was the impact that being in a home office had on the participants' sense of identity.

### **Identity**

Five participants noted the impact the closing of the office had on their identity. All participants made reference to feeling that they were less known in the community. For example, they were no longer able to host meetings without finding another location. This made them question their identity and current role within the community because previously they had been in a visible leadership role within the community, acting as a catalyst for change, but now they were less visible.

I think part of the challenge was losing identity. Specifically, in terms of having an office in the community and the challenge at times with meetings. I could no longer really *host* a meeting without arranging a room in another facility. I didn't feel I still had an identity. I think it's a combination of both the organization and

myself. My identity was more my identity with the rest of the organization.

Even with the old office, there wasn't as strong of a connection when you're not there day to day as when you're only there once every 2 weeks or once every 3 weeks. So that was part of it. An identity within the community too I think was a challenge. I think identity comes from being in the atmosphere of the organization and that comes much more quickly when you're in the same physical atmosphere. (Jeris, p. 6)

Participants described how their identity was tied closely with how they were able to conduct their job and were viewed in the community. The move into a home office resulted in the questioning of their identity for 5 of the participants. This questioning of identity is further explored below, specifically within the context of the various roles that these participants played in their work lives.

### **Role**

The largest component of the participants' job was to provide consultation within the community catchment area for which they were responsible. The removal of a physical structure within communities was a concern to some participants as part of the consultation services they provided to ensure that a corporate presence was maintained. All but one participant raised concerns about the lack of organizational visibility. Jennifer offered a particularly compelling example.

What I have concerns about though is the lack of a visible organizational presence. People tell me that I've disappeared. Now, I haven't disappeared at my regular committee meetings so those people, I think, would not see much difference between me in the old office and me in my home office. The kind of

collateral players, the staff who work in a social service agency, they wouldn't see me in the same way anymore because they used to come into the old office and pick up brochures. They would come to our office for different things and that would be my only contact with them. I certainly think that our organization is much less visible in the community, and that's a concern. (Jennifer, p. 8)

Julie stated, "I don't think they [the community] see us as a key player anymore. It makes me very sad that that's happened; they think we just left town" (Julie, p. 26).

Dave also spoke about less visibility in addition to a decrease in public access to information.

I'm not sure if the toll free number goes into the phone book or not. I think it's more just through word of mouth and my business card that it was promoted. I do get the odd phone call from people who have been talking to someone and they've been told to call, but generally the public out there now doesn't have that resource. We used to have quite a bit of [drop-in] traffic off the street and from students looking for information. I suppose that's been offset to some degree by the computer, and now a lot of people have access to the information through our website. However, out in rural areas, I think perhaps the impact is greater and the people relied on us in the past for information and we don't really provide that role anymore. (Dave, p. 12)

Tracey also referred to the decreased visibility by stating, "I'm not getting the calls that I used to get. The home office number is supposed to be out there but it's not" (Tracey, p. 4). Jeris said, "It's a challenge because people would question, 'Are you still here? Are

you still working?' They didn't see the presence of us" (Jeris, p. 6). Dave further spoke about a perceived initial loss of credibility as a result of the office closures.

Some people have expressed their concern and even anger that [closing offices] is something that the organization is doing. We've probably lost, and I can't really tell to what degree, a certain amount of credibility. It's probably waned a bit now that we've had a year of the change. Fortunately, because of the kinds of projects that we do, we're still able to maintain a high profile in the community. (Dave, p. 13)

Melissa reflected that it took some time for the community to make the transition to acknowledging the new home office location.

Community members knew I was moving but didn't remember. It took a couple of months for people to know how to find me. They would call the old number and be redirected. My mail was a bit of a challenge, even though I sent out change of addresses. There were lots of places that didn't change it [in their files] and I'd still get mail at the old office location. (Melissa, p. 14)

With respect to other organizational impacts, all participants reported perceiving no impacts with respect to their career development and opportunities as a result of being in a home office. They did report, however, that they perceived that few individuals in the head office were aware that there were home offices throughout the province. Issues of visibility that were raised by the participants related to the Department as a whole, rather than specifically to the home office. Melissa described her perception of how the organization perceived home offices.



I've not heard disparaging comments about home offices. I think there's not a whole lot of knowledge in some of the other departments. I think there's less of an understanding of the provincial offices and people don't *get* that there are home offices too, but I think that's more a symptom of a head office-ism rather than the home office issue. (Melissa, p. 22)

A further organizational impact experienced by participants was that home office employees seemed to feel that the organization did not care about them. Jeris offered her insight into the home office employee's perception of how home offices are viewed within the larger organization.

They may ask me personally how I'm doing in a home office but they don't care. All they want from me is to do the work that I was doing before and continue to do the work that I say I will do. They don't give a darn about the home office. (Bob, p. 23)

Jennifer reported, "The organization never loses as far as my time. I think they were wise. I feel I'm really producing much more than I did before" (Jennifer, p. 12). Tracey reported, "Financially, I'm sure they're [home offices] working very well for the organization. I don't know how the managers perceive it in terms of management issues" (Tracey, p. 15). Julie reported, "I think that the organization thinks home offices are working just fine. I think that's what they want to see" (Julie, p. 16).

Participants reported varying perceptions relating to their role with respect to programming and support activities. Melissa described her method to address the new addition of administrative functions to her job requirements.

If I can't figure it out or if it's going to take too long to figure out, then I phone [the secretary]. I don't want to take too much time with technical stuff because I don't have a lot of spare time to waste. It becomes my time waster and not my job. I figure my job description does not say anything about technical stuff, and if I can't solve it quickly, I look for who can solve it. (Melissa, p. 17)

Participants discussed how their roles were required to change following the move to home offices. The perception by the community, the organization, and peers and the type of work that was required all were modified as a result of the office change. Jeris described that only after moving into a home office did she realize that the way work had been done in the past would change. She stated, "It's amazing how much is done on an informal level, that you don't recognize until you get into that isolated situation" (Jeris, p. 6).

In summary, no participants mentioned any differences between the work done by their traditional office peers and the work done by home office staff. No participants mentioned being aware of any negative perceptions of home offices by peers. The organizational and personal impacts experienced by home office employees were challenging for the participants. They reported struggling to define themselves and their role within their new work environment. Corporate impacts that were reported included a decrease in support and corporate visibility within the community. These impacts resulted in a reinforcement of the feeling of isolation experienced by the participants.

### **Home Office Environment**

Reports on the percentage of people who enjoyed the home office environment seemed to vary depending on whether the participants themselves enjoyed their

experience. Melissa reported that her perception was that the majority enjoyed the home office environment.

Seventy-five percent love it and the other 25 find it ok. Actually, I've never talked to anyone who hated it. I had spoken with former employees who didn't like a home office, so I'm not surprised that it might have been an impetus for moving on to do other things. I know that home office people, whom I've spoken with and who *love* it, are really glad to talk to me about it because they love it too. I'm sometimes reluctant to sing the praises of home offices around people who aren't in a home office because of the personal benefits, and as a government employee, I'm not supposed to love my job. I don't want to seem like bragging, that's not the right word, but rubbing it in. (Melissa, p. 20)

On the other hand, Julie's perception was the opposite. She perceived that more people did not like being in a home office rather than liked it.

The people either really love it or really hate it. I haven't talked to anyone yet who is sort of in between. The ones who hate it realize they don't have much of a choice. The people who I've observed who love it have had a home office for years and have their own things going on in that home office so it was easy for them just to throw in the organizational piece. (Julie, p. 24)

### **Skill Set**

One of the key skills that is part of a successful home office environment is the ability to be self-directed. Jane specifically voiced her concerns in this regard by initially questioning her ability to stay focused prior to moving into a home office.

I really had absolutely no idea whether it would work for me or not. Just knowing my own personality, I was a little worried about whether I would be able to stay motivated and not want to go downstairs and watch TV. But I don't feel the urge to go down and do that. (Jane, p. 5)

Computer, printer, and fax technical skills were mentioned as an area of importance to effective functioning in a home office environment. There were ranges of skill levels in this area. Most participants reported not knowing how to change a printer cartridge or program the fax machine, and Julie reported just knowing how to turn the computer on prior to going into the home office. These new skills were a challenge for staff, but after one year, most were reporting an increased comfort level with the technology. Jennifer, in describing her experience with technology, echoed the experience of other participants.

The technical things were a nightmare. Looking back, it's funny but oh, it was very stressful; all these new technical things that I had never done before. The technical stuff is still a challenge but not as great a challenge. (Jennifer, p. 5)

Participants reported the most discomfort and the least amount of knowledge with computer hardware. No participant reported taking any organized courses in this area. If nonsoftware problems arose, all participants reported relying on the assistance of the secretarial staff and staff in the organization's computer department.

Further, there were a range of skills and expectations for additional administrative tasks associated with a home office. For example, filing, typing, courier, and payroll were now the responsibility of the home office staff person, where previously these were the role of the secretary. The Home Office Manual developed by the organization

provided participants with copies of the forms and directions on how to fill them out.

The individuals who had been employed by the organization for greater than 10 years seemed to have a greater adjustment. Bob described his adjustment process.

The newness of it all, the secretarial tasks, the computer, all were scaring the living daylights out of me. Oh my God, where's my secretary? Will I find anything? ... We're the highest paid secretaries in the organization. It's part of the reality that we find ourselves in. (Bob, p. 31)

Participants developed individual ways of solving problems when they arose. All but Julie seemed to have increased their independence when problem solving over the time they were in the home office. It appeared that, as their confidence grew and the number of new experiences decreased, the more likely the participants were to attempt to solve problems themselves before seeking assistance from others.

To summarize the results about required skill sets, moving into a home office resulted in the participants needing to enhance their skills within the areas of self-directedness, technical as they related to the use of the computer, administration, and problem solving. Although all participants reported that a great deal of learning was initially required, the greatest learning was required within the area of technical support. Once the initial learning was accomplished, participants reported an increase in productivity.

### **Productivity**

The new work environment offered several advantages and disadvantages with respect to productivity. Tracey, Bob, and Jane made reference to the flexibility that the home office environment allowed and the impact it had on their personal lives. They

commented on the advantage they had for personal errands through the day or for allowing workmen to come into the house during the day without affecting their work day. Tracey described how she took advantage of the flexibility the new work environment offered.

Some days for lunch I decide to go into town and pick something up. By the time I get there and do it and come back it's an hour and a half. On other occasions, I've started work at 7:30 and knocked off at 3:30 or 4:00 because I wanted to do something. (Tracey, p. 2)

One of the challenges faced by Melissa, Julie, Jennifer, and Dave was determining what to bring to their home office when they had limited storage space and deciding which files and resources could be disposed of elsewhere. The concern many cited was trying to determine what would be needed and what was important, fearing that if they got rid of something important they would not be able to access it again. Melissa stated that she had a difficult time selecting the resources she should keep.

I didn't have a good sense of what was important and what was useful or not useful for a lot of resources, and I'm not a thrower-awayer. I had a tough time sorting out what I could throw away or get rid of in some way and what I would bring with me. When I'm getting rid of things and when I'm deciding what I need and what I don't, I use the "can I get it somewhere else" test and then I have to trust that it will be there. (Melissa, p. 3)

All but one participant reported their work productivity increased as a result of being in a home office environment. Some participants attributed this increase to better computer skills, while others attributed it to increased ability to concentrate and fewer

disruptions. As Dave reported, “I think I’ve probably increased my productivity in terms of learning computer skills and maintaining that function. As I say, with computerization, we’ve been able to do some things more quickly than was the case in the past” (Dave, p. 4). Melissa made specific reference to fewer disruptions throughout the day by saying, “My feeling is I work more because I do not have those social interruptions. I don’t have temptations to talk” (Melissa, p. 2). Julie reported a decrease in her productivity and cited technical problems with the computer and E-mail system as the cause.

An issue raised by both Melissa and Jane was the need to adapt to a time delay in getting a response from management or other colleagues. They made reference to having to rely on voicemail and E-mail to contact people, as they did not know when a colleague or manager was in the office. Previously, they had that immediate knowledge, as the work space was shared. The reported average wait time for a response was 1 to 2 days. Jeris, for example, stated,

I missed the ability to consult with colleagues. I mean, I could do that over the phone but now I can’t physically sit with someone and say, “Well look at this, this is what I’m working on. Have you dealt with that before?” *That* I miss, in terms of having the ability to consult to someone on a more informal basis. (Jeris, p. 6)

Tracey, Melissa, Dave, and Julie each reported that being in a home office required more planning skills.

I find it a little more difficult to do presentations because the resources aren’t there [in the office] to prepare with in advance. It requires more timing, and in terms of trying to plan something and when you get really busy, it’s difficult. I

find it frustrating on occasion when I go to do something and the studies aren't here and I just simply don't have the space in my house to have all the report and stuff. (Tracey, p. 4)

With respect to responding to the organizational requests for community information, many participants indicated that this was a greater challenge now as they were not as connected to the community as they had previously been. Tracey articulated this by saying, "I feel out of touch with the community. Sometimes I think it's not as easy to do some of the things I do because I've got to now search out some of the information so I can respond to things" (Tracey, p. 6).

Participants reported that the flexibility of a home office increased their productivity within their personal lives. At work, there were challenges faced by the participants with respect to access to the necessary resources and files, but all but one participant acknowledged an increase in overall productivity. Participants reported needing to learn an alternative method for consulting with colleagues, which resulted in an increase in planning skills. The physical environment in which the participants worked also contributed to the productivity of participants.

### **Transition Issues**

Most individuals' office location was a separate space specifically used for their office, while Melissa and Julie partitioned off a section of a room. Most locations were bright, warm, and welcoming, while Julie's was dark and cold. Individuals displayed pride in the way their office was set up. Following the completion of the interviews, Jane asked me if her office was the nicest I had visited, seemingly wanting acknowledgement that the set-up and décor of her office were special. This one offhand question illustrated



the pride the participants took in their environment. Jeris, Jane, and Bob spoke specifically about the care they took in setting up the office and creating the correct “feel and look” they wanted. Bob described his experience by stating,

I was trying to set up the space that was as comfortable as possible. So, I spent a long time choosing the rug I have down. I wanted a rug because a rug meant warmth and comfort on the hardwood floor. The colour of the paint, if I was going to spend a long time in here, I wanted the paint to feel *good*, to have a nice feel to it. I wanted to spend some time figuring out where I’d put my desk. I’ve always had my desk near a window, so I put my desk by a window with easy access to the computer and the fax machine, so I’m sort of set up like a U shape, and I can now get to all those things without standing up. The challenge was taking that empty space and turning it into an office space that would be comfortable for me. (Bob, p. 13)

In one area of the province, more problems around the physical move into the home office were reported. Issues raised primarily focused on unclear assignment of tasks and decision-making authority, resulting in delayed phone and fax line hook-ups and moving of furniture. Participants reported receiving no assistance in setting up their offices and, in one case, received no assistance with moving some of the furniture. Tracey reported her experience.

One problem was the filing cabinet that I wanted was in the nearest traditional office and so the organization said, “Oh, just come and pick it up.” My husband has a truck, so my husband and I went to pick it up and fortunately for me there was a male staff member in the office and they were able to get it on the truck.

Filing cabinets are extremely heavy. We got it home and tried to get it off the truck, but in the process my husband injured his hand. It was quite a serious injury. He shouldn't have been doing that. I think that the organization should have moved it. (Tracey, p. 6)

The participants also raised the issue of the old office closure. It was the responsibility of the participants to close the old office and dispose of old materials. Julie, Jeris, and Tracey reported receiving varying levels of support for this process; the remaining participants did not mention the old office closure as an issue. The participants who raised the old office closure as an issue specifically made reference to the volume of work that had to be done in a short period of time and the lack of direction given regarding the disposal of furniture and resources. Julie described her experience with the move by stating,

They really didn't give it enough time to think it through properly. We were left holding the bag. It was my assumption that the organization was going to come in, take things down off walls, pack things up, and that would be it. Well, guess what? They didn't. They left it to the support staff. It was an incredible task for one person, so I pitched in and we packed everything up and distributed it, and this really affected my ability to do my job at the time. I was helping distribute everything, which I shouldn't have been doing, and closing things down and dealing with stupid things like movers. We shouldn't have had to do that. (Julie, p. 10)

The organization paid for movers to move the furniture and files to the new home office location and for two new phone lines to be installed into the home office location.

Only in two cases was new furniture purchased specifically for the home office by the organization. The purchase of new equipment was not consistent throughout the province. All offices were equipped with a new fax machine, computer, printer, E-mail access, and, in all but one location, a portable phone.

The actual set-up of the equipment differed throughout the province. In most situations, the manager's secretary assisted on site to hook up the computer, printer, and fax machine and to load the E-mail program. In one situation, the participant completed most of these tasks herself due to her skill level. Most participants reported not knowing how to hook up the equipment prior to moving into the home office. In four instances, the fax machine was delivered and set up by the sales person where the machine was purchased.

The process of deciding what files and resources were critical to have in their new office was a challenge raised by most participants. Storage space in the home office was limited for all participants. Dave and Julie referred to storing audiovisual equipment and files in their garages and making arrangements to store some presentation and meeting equipment at other community agencies. Dave referred to his approach to addressing the storage needs by stating,

It was a nice experience, actually, that people I've worked with, and I think my colleague in the area found the same, that they're [the community] quite supportive around the whole issue of moving home and they've been good at offering their space for meetings and even storing things for us, so that has worked out pretty well. (Dave, p. 8)

All participants took pride in their work space and attempted to make the space welcoming. The one participant who had a less welcoming work space also reported the lowest productivity. The physical set-up of the office and support offered differed depending on the area within the province. The issue of support is further explored in the next section.

### **Support**

Varying levels of support were offered to the participants from within the organization. The amount and type of support appeared to be a significant factor in the adaptation to the new work environment. Organizational support included managerial support, options and choice regarding the participant's particular situation, an employee assistance program available, and a feeling of trust between the participants and management. Other types of support explored within this chapter include administrative, peer, and family.

#### **Organizational**

With respect to preparing the participants for the transition to a home office, participants reported receiving differing types of support from their managers. Supports ranged from offering a package of research articles to read to offering workshops on running a small business. In all areas of the province, time was made available within monthly staff meetings for home office staff to discuss the transition.

Four staff reported that they did not feel that management was as supportive as they could have been. Tracey described her experience when she first moved to a home office.

In the first 6 months it would have been useful if management had gone out of their way to try and see how we were doing, the [kind of] help or support we needed then, and to encourage the traditional office staff to be sensitive to the changes that we were going through because it's a big cultural change. (Tracey, p. 19)

Jeris suggested that additional support should have been offered to staff at the start of the transition.

It would have been helpful if they gave us the additional support at the beginning, then take it away after we're set up, rather than taking it away immediately, making us flounder and adding to our stress level when we've already made this big move. To me, it didn't make logical sense. (Jeris, p. 5)

Management also developed a "Home Office Manual" through a collaborative process with staff. Three participants referred to this manual as a resource that provided assistance in the transition. The manual was made available several months after the move to home offices had taken place.

Many participants discussed the basic needs they had prior to moving into a home office. They reported that what was offered by management did not address these needs. The needs included a basic understanding of how a computer works, how the fax machine works, how to change the paper, what to do if the paper jams, and how to set up the voicemail system. These needs were termed by Jennifer as "strategies to survive successfully in a home office" (Jennifer, p. 10). Jennifer also questioned whether management had given any thought to establishing a network of home office employees

to trade tips and to solve problems around psychological issues as she felt it would be helpful.

Jennifer, Jeris, and Julie made reference to feeling like the many changes that were imposed on home office staff during the transition were a “test of their ability.” Two felt that the lack of support was a test of their computer skills, while the third felt that it was a test of their coping mechanisms in general. Jennifer described her feelings at that time. “I was almost crying. I said, ‘I think they’re trying to drive me crazy!’ I remember it as clear as anything. But that’s how pressured and overwhelmed I felt with it” (Jennifer, p. 5).

Bob, Tracey, and Jennifer referred to the financial impacts of preparing and operating a home office. Bob specifically referred to the tax implications.

I had a big, whopping \$360 deduction on my taxes, and as far as I’m concerned it cost me more than \$360 to operate this joint each year. There’s so many things you cannot deduct. It’s pretty lousy you know. I’m not looking to make money, just the fair exchange of the costs for this. (Bob, p. 19)

The issue of choice was a major factor for all but two participants. Bob, Jennifer, Dave, Jeris, and Tracey each reported they were offered no options regarding whether or not to move into a home office environment. All participants felt they were strongly encouraged to move into a home office. All but three participants felt that, given the location of the nearest traditional office and the lack of free space, the only real options for them were to move into a home office or to leave the organization. Although Julie perceived some choice in the initial decision, she perceived that there would also be a trial time for employees going into home offices where, if it did not work out, they could

go into a traditional office. Unfortunately, that option was no longer available when she requested it one year later.

My understanding at the time was that we would *try* and that's no longer my understanding. I asked what the options were to get out of the home office, and going into a traditional office was no longer an option. (Julie, p. 8)

Participant perceptions about organizational expectations during the transition added to the challenges felt by participants. There was a perceived expectation that employees could not take the time to set up their offices. Tracey described her understanding of the expectations by stating,

Nobody ever said I could have the luxury of getting set up. My sense was it was just that I was expected to continue working. There was no real communication from anybody about any expectations other than the technology. (Tracey, p. 8)

Two participants looked forward to going into a home office and thus reported the lowest amount of transition time. Melissa chose a home office immediately as she saw it as the best fit with her work style. As a result, she required little adjustment time. "I foresaw the benefits and this is what I wanted to do. By the time my office was unpacked, I was into the routine" (Melissa, p. 25). Jane also chose a home office and saw it as an opportunity to try something new. She too reported it took only about 2 weeks to get into a routine.

The organization had an employee assistance program available to staff. Only one participant reported using the service to assist with the change in the work environment. According to the Vice-President of the division under which the

participants worked, an increase was reported in the use of the program during the transition by staff throughout the province (personal communication, July 16, 1998).

Trust was another issue raised by participants. Melissa, Julie, and Jeris each made reference to trust issues. Both Julie and Jeris felt that management did not trust home office employees. Jeris stated her impression that “there seemed to be a true mistrust from managers. That generally, the impression was that somehow home office staff weren’t the same as the other staff, that they needed to be watched more closely” (Jeris, p. 11). Conversely, Melissa described a situation of mutual trust when asking for flexibility, “I trust them to say ‘yes’ and they trust me to ask only when it’s necessary” (Melissa, p. 7).

The amount of support offered to the participants varied greatly but did not seem to meet the needs in all but four cases. The greatest adjustment period seemed to be the initial 6 months of moving into a home office. Participants discussed the challenges they faced, given the amount of learning required of them as well as the financial obligations that were now placed on the participants in the operation of their office. All but 2 participants reported feeling they had no control over the decision to move into a home office, and they observed that trust was a factor in the way they now interacted with management. Those participants who felt trusted and chose to go into a home office environment seemed to adjust the most quickly to the new work situation.

### **Administrative**

All participants discussed the technical and administrative support that was offered by the traditional office secretary and the manager’s secretary. This support was offered over the telephone and through E-mail. Jennifer, Jeris, and Dave made reference



to the need for clear roles for each of the secretaries. Jeris referred to some confusion that resulted from unclear roles.

I found it very difficult to get clear answers as to what was going to happen, when, and who was supposed to be arranging things. It was very confusing at times. (Jeris, p.3) It created an atmosphere that was, rather than cooperative and team building, very adversarial and made me as a home office person feel very isolated and with no support whatsoever. I couldn't even have the secretary who lived in my same home town where my home office is spend an hour with me in the morning without it becoming a crisis situation. (Jeris, p. 5)

Computer assistance with problem solving around hardware and software issues was the most frequently reported type of assistance received. Two participants made reference to getting assistance from the traditional office secretarial staff in preparing presentation materials, formatting large documents, and sending large mailings. Dave reported that he was selective about the things he asked for assistance with, citing improved computer skills. "I can call the office secretary to do some stuff, but I think in most cases it's just easier to do it myself. If I have a big project or whatever, I'll certainly ask for her help" (Dave, p. 7).

Tracey discussed other administrative challenges when she reported difficulties with arranging for a courier drop box at her home.

I really needed the courier service. They were telling my manager's secretary that I couldn't have a big drop box because I couldn't guarantee them daily pickup, and I didn't want a small box as I had to nail it to the siding on my house. I

finally got the box because the delivery fellow was really neat and got me a box. (Tracey, p. 5)

Administration was an area that was new to most participants. Participants reported needing to become more self-reliant to solve their administrative problems. The support provided through the transition as well as ongoing support were not clearly defined and appeared to contribute to the feelings of isolation that many of the participants reported.

### **Peer**

Another potential source of support was the participants' peers, both within and outside of their provincial regions. Participants reported that they primarily relied on colleagues from within their region of the province to discuss issues relating to the home office. Limited sharing of experiences with colleagues outside of their region occurred. Dave and Jennifer both discussed the need for an organizationally sanctioned network of home office employees to be established. The employees reported that this network could be used for solving problems, sharing experiences, and decreasing isolation.

### **Family**

Family members played various roles as they interacted with the new work environment. Tracey reported using her spouse for technical assistance as her spouse knew a lot about computers. "I got most of my computer training in the last year from my husband. He knows more than I do. He was helpful to me" (Tracey, p. 14). Jennifer reported using her spouse for an increased amount of emotional assistance throughout the transition, while Julie observed that her child felt that the home office was an imposition

on the family's personal space. Julie described the impact it had on her daughter by stating,

If I'm sitting here having a meeting and my daughter decides to bring home five of her friends, I think that *too* is an intrusion into our life. She comes in and she goes "uh-oh" and she shouldn't have to do that. (Julie, p. 6) She doesn't like it when something kind of negative is happening at work for whatever reason. She doesn't like to walk in and feel those vibes, because we've always worked so hard to make our home a positive place. (Julie, p. 7)

Family members played a variety of supportive and nonsupportive roles. They offered technical assistance where required, they offered emotional support through the transition, while others felt the new office was an imposition on their personal space.

To summarize, this section discussed the various types of support available to the participants. Supports included organizational, administrative, peer, and family. Supports offered were supportive to varying degrees. There appeared to be an expectation by the participants that supports should be externally created rather than internally driven. This expectation appears to be a contributing factor to the feeling of isolation reported by most participants.

### **Personal Development**

Participants each experienced varying levels of personal development. Personal development is broken into two main areas: learning needs and personal skills. Learning needs included an increased awareness and refinement of skills, the establishment of boundaries within both work and personal aspects of participants' lives, and the development of technical knowledge. Within personal skill development, skills that were

enhanced include independence, problem solving, networking, and self-marketing.

This section explores each of these aspects of personal development.

### **Learning Needs**

The greatest learning need for all home office staff with respect to administrative functions was adapting to the additional responsibilities formerly done by the office secretary. These duties included payroll, courier, mail, expense form coding, and photocopying. These duties are similar to those of an independent businessperson. The home office manual offered some guidance to the participants on administrative functions. All but Jeris reported they received some training from the traditional office secretary prior to moving into a home office. Only Bob made reference to incorporating the function of office cleaning into their work day, with the rationale that previously that function was done for him, and now he was responsible for it so it should be done on office time. Jennifer, Melissa, Dave, Jeris, Tracey, and Bob each reported they would have liked to receive some prior training in how to best set up a home office. All but Julie felt that after 6 months, they were more comfortable in their home office environment. Jeris reported, "The first 6 months was just a huge learning curve and there were all kinds of things going on" (Jeris, p. 17).

When participants were questioned about what facilitated the increase in comfort level, the most frequent response was time and experience: time to establish a routine and time to develop confidence and discipline. Jennifer described her process of becoming more comfortable within a home office.

For the first while I really felt off balance. It took me about 6 months to kind of get into a routine and felt that I was in control again. (Jennifer, p. 5) The feeling

of control was experience and time of just being here and doing it; learning how to get your work done, establishing a routine, and developing confidence and discipline. It's more the confidence that I can do this that was the main thing.

(Jennifer, p. 15)

Upon reflection of the skills further refined by being in a home office, 3 participants identified additional improvements. Jennifer reported becoming more disciplined, organized, independent, self-initiating, and computer literate. Dave reported being more self-disciplined, independent, and self-reliant. He also improved his time management skills and learned to take the initiative to seek out social contact when needed, whereas previously it was not an issue. Jeris reported that after her "steep learning curve" period, she became more efficient, faster, and better at administrative tasks.

Four participants made specific reference to boundaries relating to their personal life during work time. Three unique responses were reported. Julie found that tasks around the home were a distraction, particularly when the feeling of isolation was the greatest. Melissa did not allow herself to alter her work routine and made certain that no "house tasks" were done during work hours, with the rationale that if she were still in a traditional office, she would not have had that opportunity. She reported being concerned that if she allowed herself to "throw a load of laundry in during the day" (Melissa, p. 30), she would increasingly allow her personal commitments to impinge on her work commitments.

On the other hand, 2 participants welcomed the advantages a home office environment offered to their personal lives and occasionally integrated personal errands

into their day. Tracey and Bob both discussed the advantage of the flexibility that a home office environment provided, such as answering their personal phone and flexing work hours to accommodate personal errands. Bob appeared to take advantage of the flextime option to a greater degree than Tracey. Tracey reported her use of the flextime option in this way:

Some days I take an hour for lunch and other days I have taken an hour and a half because I decided to go into town and pick something up. I work longer hours here though. On occasion, I've started work at 7:30 and knocked off at 3:30 or 4:00 because I wanted to do something. (Tracey, p. 2)

Maintaining the boundary between work and personal time was a challenge experienced by all participants. This challenge was the greatest when the transition first occurred. Jeris described her challenges with finding boundaries.

I guess I have always liked the delineation between my work and my home life. I felt that at times, particularly when the fax machine went off after hours or the phone rang after hours, that I'd find myself still going back and answering or checking the message, so I felt that there was an overlapping of home and work time. (Jeris, p. 6)

Tracey spoke about putting in extra work time during the weekday as well as on weekends.

When I was in my old office and I was going to Toronto on Monday morning, on Friday before I left the office at 4:00 p.m., I'd make sure I had everything ready to take to Toronto. Well, what happens here is I just keep working and Friday I quit work at 6:00 or 6:30 and then Sunday night I would spend an hour or 2 in the

office getting all my stuff ready to go to Toronto. (Tracey, p. 1) In the beginning I tried to stick to the kind of 9 to 5 thing, to try and normalize it, and that didn't work. I now allow myself more flexibility on the time. (Tracey, p. 18)

With respect to technology, both traditional and self-directed learning opportunities were offered to participants. For example, a sales person offered some participants a brief 15- to 20-minute introduction to their fax machine. Those who did not receive the training reported that they had to rely on either reading the manual for assistance or getting assistance from their manager's secretary. All reported that they had to do some self-directed learning to get comfortable with the technology.

I received about 20 minutes worth of training from the gentleman who the fax machine was purchased from. He showed me some of the basic features, but I had to spend some time reading the manual myself and I had a couple of situations where I had to call him and say, "I've run into problems, can you tell me how to do this?" Within a fairly short period of time I was able to figure it out but I certainly had to do some self-learning. (Dave, p. 10)

A recognition of skill level and roles with respect to technology was reflected when Melissa described a recent situation where she turned her computer on and her printer said, Low Toner.

Well, I don't know what that means and I don't know what to do with it so I'll take a look in the manual and if I can't figure it out or if it's going to take too long to figure out, then I phone the secretary. I don't want to take too much time with technical stuff. I recognize where it becomes my time waster and not my job. I

figure they don't pay me to solve my printer problems. They pay me to do programming. (Melissa, p. 17)

At the time of the move into the home office, participants had to learn an additional two new software programs relating to E-mail and a management information database. Dave described his learning process by stating,

I was doing a lot of learning the last year in the office, and since I've come home, I think my [computer] skills have improved. I've taken a number of courses now so I'm feeling much more competent in that whole issue. (Dave, p. 10)

When participants were asked to self-rate their computer skills prior to the move on a scale of 1 to 5, 5 being highly proficient, all participants rated themselves as a 3 or below. Many rated themselves at a level of 2. At the time of the interview, all participants reported an increase in their skill level ranging from 2.5 to 4. Many of the participants had taken computer software courses offered by the local college or the organization to assist with their skill development. The secretarial staff in the nearest traditional office was available to provide further assistance over the telephone. Only Melissa reported using software books to solve problems. Julie described her limited computer experience.

I didn't have a clue how to hardly turn the thing [computer] on. I took a course in basic WordPerfect a year prior to the move. It was a shock. It was a realization that I have a lot to learn and it was going to take me time because I'm not great at that stuff, but I plod away at it. (Julie, p. 11)

The participants reported a number of learning needs when they first moved into their home offices. They were required to learn a new set of administrative functions that



were previously the responsibility of the secretary. Throughout this learning process, participants reported refining their self-discipline, independence, and self-reliance to address their learning needs. One of the greatest challenges for many of the participants was learning to reestablish the boundaries between their work lives and personal lives that had been clearly established when their office had been off site.

### **Personal Skills**

The skill of working independently was further developed for all but one participant. Only Julie did not seem to increase her independence while in a home office. Melissa described how she refined her skills and independence to be more effective in a home office.

I was always a planner, but I had to refine my skills a bit more. Maybe that's something I refined a little, or maybe I just get to exercise my independence a little more. I always liked independent work. I like group work too, but I like the challenge of taking something from nothing to completion and know it's a result of what I did. If it's a screwed-up thing, it's my responsibility, and if it worked out, that's my responsibility too. (Melissa, p. 19)

Bob referred to improving his self-reliance specifically related to his computer skills by stating,

I'm constantly improving because the secretary in from the old office isn't around and because I'm on my own. I've got to get on with it. I can't constantly be calling the traditional office secretary saying, "Help! Bail me out!" when she has her other work. I said to myself, just get on with it and sort it out. This is the

situation I found myself in, and I find myself improving on the computer steadily all the time. (Bob, p. 23)

Home office employees needed to be creative and take the initiative when solving problems. Melissa provided an example of how she had to change the way she worked to overcome a communication problem with the traditional office. She described how she shared the responsibility of solving problems and how this resolved the issue.

Occasionally it's a challenge with communication to the traditional office. I would fax things and they would disappear. I discussed it with management, and the issue was dealt with and doesn't happen anymore. I also now do things a little differently. When I fax things, if I haven't heard in a day or so, I'll call and say, did you get it? I've taken some of the responsibility too, and not just assumed that it appeared where it was supposed to. (Melissa, p. 7)

Jane made reference to solving problems more extensively in a home office.

You don't have people right there to ask questions of, so you have to problem solve a little bit more extensively. For example, when the computer is doing something and you're not sure what's happening, when you're in the traditional office, you can just ask a colleague, "Do you know how to fix this?" Now, you can call someone, but usually you try to problem solve just a little bit longer before you bother to do that. (Jane, p. 3)

All participants reported feeling "disconnected" from the community since moving to a home office. Many participants had relied on informal means of networking and information-gathering through "drop-ins" into the office and casual conversations with others in the building. The participants had to learn new ways to be connected to

both the community and the organization. Jennifer specifically stated that she did not know how to network now, while others did not seem to recognize that new strategies might be required. Jeris and Bob both made reference to deliberately arriving early for meetings or staying late to be more visible and to have an opportunity to network with the meeting participants.

Three participants discussed concerns relating to “out of sight, out of mind” as it pertained to involvement in the community. They each discussed how invitations to participate in community events and on community committees had decreased. Reference was also made to community members with whom they did not regularly work commenting on their belief that the organization no longer provided service to the community. Bob discussed how previously he had more contact with the community, so he had modified his way of doing business to increase his visibility now that he was in a home office.

I would develop a pile of things to do which allows me to go to a number of sites and show my face. For example, if I have cheques for a community organization I would take them over rather than mail them just so they can see that our organization still exists and that we’re still providing service and that we’re working in the community. (Bob, p. 12)

With respect to the organization, Bob further described his approach to increasing internal visibility.

It doesn’t help being in a home office, getting connected to corporate project teams and stuff. I’ve been on some stuff and I appreciate the opportunity, I guess, but it’s my opinion that you’re out of sight, you’re out of mind. (Bob, p. 21)

Working in a home office required independence, computer skills, problem solving, and self-promotion. The participants reported needing to learn new strategies or enhance their abilities in these areas in order to be successful within this new working environment.

### **Strategies**

Adapting to the new work environment involved staff finding their own unique way to maintain the “normality” of the office day. Some participants found they needed to maintain the structure of the work day, while others did not need external mechanisms for structure. A common element found in each participant’s strategies was that of ensuring a psychological break between work and personal time and space. Another common element was that of ensuring social contact to combat feelings of isolation. Specific strategies are found in Table 2. Strategies used by participants ranged from putting a corporate sign on the door to ensuring no household chores were done during the work hours. To combat the feeling of isolation, participants reported strategies such as ensuring that breaks were taken to get them outside of the home office, increasing their volunteer work, and arriving early or staying later after a meeting to socialize.

### **Boundaries**

One of the challenges faced by the participants was that of establishing boundaries between their family life and their work life. Participants’ family life affected their work life in a number of ways: needs of children, personal commitments, and household chores. The participants’ work life affected personal time through the need for a routine, sick time, and overtime.

Table 2

Strategies for Overcoming Challenges in a Home Office Environment

Participant	Strategies
Dave	Get ready for work in the same routine as was with the old office.
Melissa	Put a sign across the office area when on vacation.
	Schedule a fitness class at the end of the day.
	Always dress professionally.
	Change out of work clothes at the end of the day.
	Handle a paper once.
	Do not do any household chores during the day.
Jeris	Make the office space look very different from home space.
	Put a corporate sign on door to office.
	Maintain old office routine when preparing for work day.
	Change clothes to signify the end of the day.
	Schedule breaks and go out of the office.
	Maximize use of E-mail and phone.
	Get involved in community volunteering.
	Know your tolerance for isolation and set up solutions.
	Maintain connections with other home office staff.
	Maintain a sense of humour.
	Regularly contact the secretary.
	With deliveries, contact the secretary as a safety precaution.

(table continues)

Bob	Drop things off in person rather than mail. Wander the halls of partner agencies to chat with colleagues. Dress professionally to maintain a professional attitude. Get a routine and make the psychological shift to work. Take advantage of the flexibility of a home office.
Tracey	Schedule meetings to ensure a maximum of 3 days in a row in the office. Focus more on social life outside of work. Make an effort to have more social contact in personal life. Focus on the advantages of a home office. Stay actively in touch with the traditional office secretary.
Julie	If overwhelmed by isolation, take a day off and go out with people. Be sure to get out of the office at least once a day. Stay in touch with colleagues.
Jane	Use E-mail more often for communication. Go into traditional office once each week. Keep focused on getting work done.
Jennifer	Break day up with social contact.

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## **Family**

Those participants with children reported teaching the children that the work space was not a play area, that they needed to respect the work hours of the day, and that the computer could not be used without prior permission. Dave described his experience:

I have two children and they've both adapted to it quite well. When my daughter comes home from school, she knows that I'm working. I recall a couple of occasions when they'd come home and turn the music on. I just explained to [them] to keep it down when I'm working at home. It generally has worked out reasonably well, and they respect the fact that I have a home office. They know until 5 o'clock they have to be a little quieter than they might otherwise be.

(Dave, p. 8)

The greatest challenge that the participants faced was with respect to psychologically and physically containing the number of work hours. Jennifer stated, "The challenge I've had in this home office is the boundary between work and home. Psychologically it gets very blurry" (Jennifer, p. 2). Julie described how she found herself returning to the office in off- hours.

Sometimes I'm down here at 3:00 in the morning because it's hard to resist when you know you have to finish something. ...I come in the door and I automatically look, even if it's 8 o'clock at night, to see if the flashing red light is going and then I do this whole mental thing about whether I should answer it or not. At the end of the day, when it's working, I always check my E-mail so that doesn't matter what time of the day or night it is. (Julie, p. 2)

The participants did not seem to find it a challenge to separate themselves from household tasks during work hours. The self-discipline required for work was not a problem for participants. For example, Jennifer observed,

One of the things that's been surprising for me is how well disciplined I am at this. One of my worries about moving home, because I love my home and it's always been that I could relax here, was that when I moved home I wouldn't be able to motivate myself to work. My problem is more that I have, at times, had a hard time turning off the work. (Jennifer, p. 19)

Tracey described how she had to learn to manage the ringing of her personal phone.

I'm thankful that we have an answering machine, because you won't believe how many calls you get during the day; people wanting to sell you God knows what; so I tend not to answer my personal phone. I had to learn that. (Tracey, p. 10)

The establishment of boundaries involved all members of the family, not just the participants themselves. Family boundaries were established around hours of work, personal errands and commitments, and household commitments. All participants needed to learn a new way of addressing these areas of distraction throughout the work day. Similarly, the work day needed to be clearly defined, and the next section addresses the challenges that participants faced in maintaining work boundaries within their personal time.

## **Work**

Participants had their own work routine to signify the start to their day. All participants started the day with checking E-mail and phone messages. Dave, Bob, and Melissa each spoke of maintaining the same grooming routine as they had when they



went to the old office. Their style of dress was still professional whether or not they would be out at meetings or staying in the office. Jennifer and Melissa both spoke of routines at the end of the day or week that assisted them with making the psychological break from work. Jennifer stated, “At the end of the week I have a little routine in which I clean my desk up. I need to have some markers for me to psychologically end here before I go into my home” (Jennifer, p. 1).

Because individuals had offices in their homes, the proximity resulted in individuals working when they were ill and would not otherwise have worked; therefore, they appeared to have a strong commitment to their jobs. Two individuals made reference to going in to work when they were sick because their office was in the next room. Neither said they would have gone into the office if they still were in a traditional office setting.

I would still come in, check my E-mails, respond to my messages, and do the things that had to be done. When I was completed the pressing items I felt had to be done, then I'd call in sick and quit for the day. (Jane, p. 24)

Dave reported, “You tend to feel somewhat guilty. I'll just sort of grin and bear it and go in and do some work anyway” (Dave, p. 15).

It was common for participants to report checking E-mail and phone messages while on vacation or after hours when they had been out of town. Bob commented, “I think you need as much discipline in a home office to walk away from the work as you need discipline to do your work” (Bob, p. 19). It was also frequently reported that preparations for the following day or week were done outside of work hours. These extra hours were not recorded as overtime or flex hours. Participants reported varying

regularity of this extra work time, but all reported that it occurred. Only two participants reported that, after being in a home office for a year, the frequency of this occurrence had decreased. The remaining participants reported still struggling with maintaining boundaries. Melissa reported, “I did check E-mail sometimes because I did not want to have hundreds when I came back [from vacation]” (Melissa, p. 5). Jane described her experience by stating,

I noticed that I’d come home, turn on my computer at 9 o’clock at night, and check and respond to my E-mail. I’d do small things and get them out of the way if the next day I was off at meetings and wouldn’t be able to get to those things. Because it’s right here in your home, it’s more accessible and I’m inclined to work. (Jane, p. 24)

All participants appeared committed to their work. Establishing a routine, respecting sick time, and maintaining hours of business were areas of concern for the participants. Each individual developed strategies to address each of these areas of concern. Participants reported that they had to learn how to establish and maintain boundaries. At the time of the interviews, however, two participants were still struggling with establishing a balance between family and work.

### **Skills and Attributes for a New Home Office Person**

Working in a home office environment was a new experience for all of the participants. Upon reflection, the participants offered their insights into the skills and attributes that they felt were important in an individual, as well as the necessary orientation period a new employee may require to be successful in a self-directed work environment.

The strengths and weaknesses that each participant identified within themselves as they made their transition to a home office were reflected within the identified skills and attributes they felt a person new to a home office environment should bring with them. Common skills included computer and technical expertise, administrative skills, and strong problem-solving ability. Common attributes included independence and an internal motivation. The specific skills and attributes are presented in Table 3.

### **Orientation**

To further assist the organization under study, the participants were asked to provide some insight into the orientation requirements of a new home office employee. This orientation period would provide new employees an opportunity to develop and refine the skills that were identified as important to the successful functioning within a

Table 3

Skills and Attributes of a Home Office Employee

Participant	Skills and Attributes
Melissa	<p>Be comfortable without the social environment of an office.</p> <p>Be very comfortable alone.</p> <p>Be an independent worker.</p> <p>Be organized.</p> <p>Be able to balance work and personal life.</p> <p>Have outside interests.</p> <p>Be flexible and be resourceful in finding solutions.</p>
Julie	<p>Have computer expertise and technical knowledge.</p> <p>Prefer to work on your own.</p> <p>Have support from family.</p> <p>Have the space for an office.</p>
Jane	<p>Have an ability to work independently.</p> <p>Have skills to seek out others.</p> <p>Have computer and technical skills.</p> <p>Have strong problem-solving skills.</p> <p>Be adaptable to change.</p> <p>Have no fear of technology.</p>
Bob	<p>Be self-disciplined.</p> <p>Be independent, self-starter, self-motivated, assertive, curious.</p>

(table continues)

	Have outside interests other than work.
	Have computer skills, secretarial/administrative skills, planning skills, time management skills.
	Be proactive to take advantage of opportunities.
Jennifer	Have a good sense of humour.
	Be well organized, self-disciplined.
	Be conscientious about personal and work time.
	Be independent, mature.
	Have previous work experience.
	Have knowledge in setting up filing system, planning work, time management.
Dave	Be well disciplined.
	Be comfortable asking questions and knowing where to go for assistance.
	Have ability to problem-solve.
	Be able to work independently.
	Be able to work with little supervision.
	Be self-disciplined.
	Have the proper facilities in your home.
Jeris	Be personally motivated, organized, like to work independently.
	Have computer skills, ability to learn new skills, planning skills.
	Be previously connected to community.
Tracey	Be mature, a self-starter, technically competent, flexible.
	Be able to ask questions.

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self-directed work environment. Specifically, participants responded to the amount of time an employee would require to adapt to a home office environment. Orientation time reported by participants ranged from 2 days to 6 months. Most participants seemed to feel that the transition to a home office should occur slowly so as to give the new employee time to adjust to the new job and to a home office environment. Some participants suggested phasing in working full time from a home office. One of the most common suggestions offered was the identification of peer mentors to assist with the transition to a home office. This mentor would field questions and concerns that may arise. Specific suggestions are listed in Table 4.

### **Summary**

This chapter presented the findings of interviews with 6 women and 2 men who underwent a transition from a directed work environment to a self-directed work environment. In order to understand the experience of the participants, the results were presented in four inductive categories. These categories were impacts, support, personal development, and boundaries.

The four inductive categories resulted in some key findings. First, the learner was explored with respect to their personal impacts, learning needs, required skill set, and personal skills. Some of the findings suggested that the participants' need for social contact and their ability to learn new ways to conduct their jobs were critical aspects to the successful transition.

Table 4

Orientation of a New Home Office Employee

Participant	Aspects of an Orientation
Melissa	<p>Have a home office manual for reference.</p> <p>Match a new home office person with a person in a similar personal situation.</p> <p>Spend time in traditional office with secretary for administrative orientation.</p> <p>Have a 1-week orientation to the organization and programs.</p> <p>Meet with the regional administrative assistant to assist with office set-up.</p>
Julie	Have a comprehensive orientation to the organization and programs.
Jane	<p>Develop relationships before going into home office.</p> <p>Pair new employee with another employee for mentoring.</p> <p>Orientation to last up to 6 months for new employees not familiar with community.</p>
Bob	<p>Orientation to occur over 3 months but in home office.</p> <p>Meet and speak with other employees in region.</p> <p>Allow for a 6-month transition for comfort.</p>
Jennifer	<p>Have an orientation to the organization.</p> <p>Spend 3 months in traditional office to learn programs and organization.</p>

(table continues)

- Assign a home office mentor.
- Dave      Spend 1 month in the traditional office learning about programs and the organization.
- Speak with other home office staff.
- Jeris      Have time in traditional office on a regular basis.
- Start with 3 days in traditional, 2 days in home, and gradually increase the time in the home office over a 6-month period.
- Tracey    Have an orientation to the organization and to the department.
- Establish clear lines of communication.
- Have 2 or 3 home office mentors.
-



Second, the community, organization, peers, new work expectations, and boundaries relating to work and family were explored within the context of the learning environment. Key findings in this area suggested that much of a participant's identity was defined by the role within the community and that, with the transition, the role changed. This resulted in the necessary redefining of the participant's self-identity. Another key finding was the role that choice played in the acceptance of the transition to a self-directed work environment.

Third, the social context in which learners find themselves was explored through organizational, family, and administrative support. A key finding was the importance of the work environment and that family member roles became redefined as a result of the transition. Participants took great care in creating a work space that was visually pleasing and comfortable. The one participant who did not have a comfortable work space had the lowest job satisfaction. Family members took on a new role of providing technical assistance for computer problems that arose.

These results demonstrate that the interrelationship among the individual, the immediate environment, and the social context played a key role in the enjoyment and adjustment process of moving from a directed to a self-directed work environment (see Figure 1). It is within this context that the findings will be discussed in Chapter Five. Chapter Five will also present recommendations for successful functioning within a self-directed work environment, and will discuss the implications for practice, for theory, and for further research.

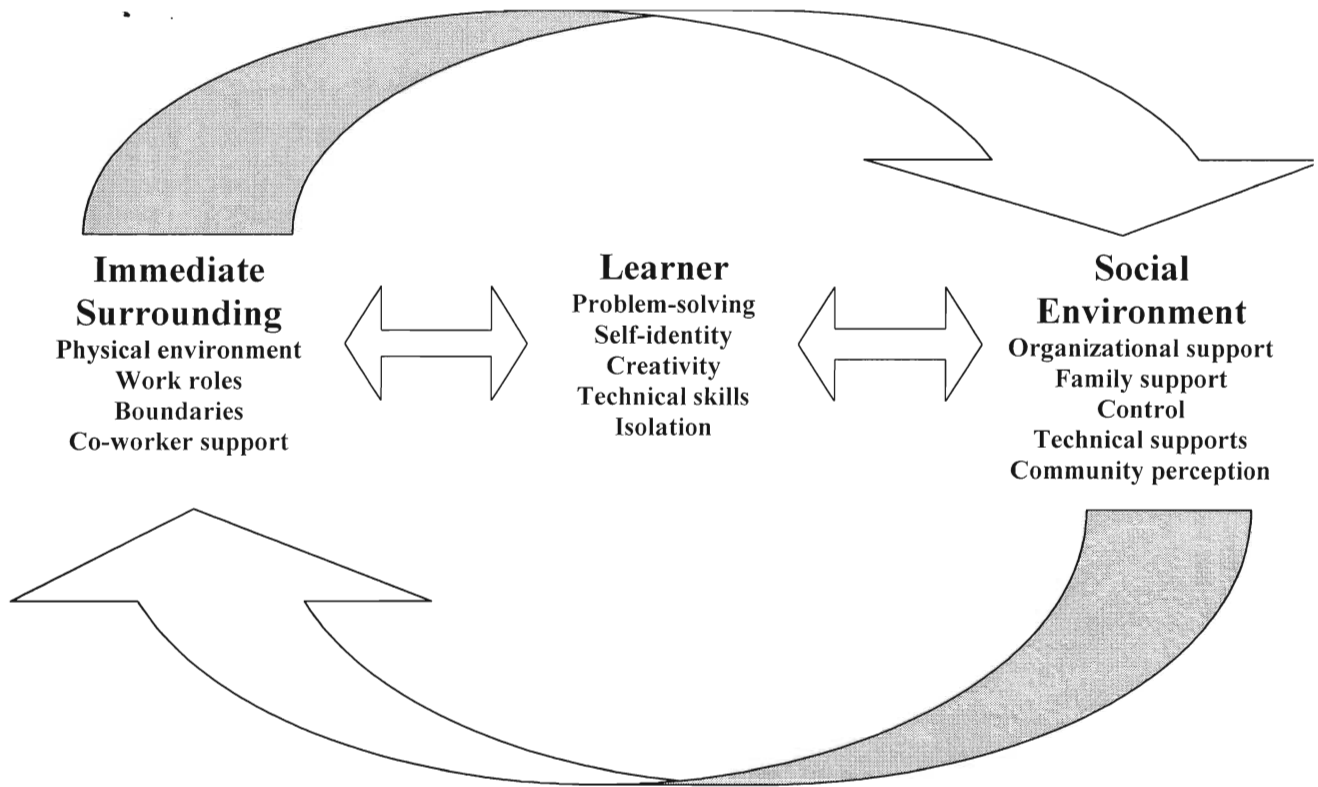


Figure 1. The interrelationship among the learner, their immediate surroundings, and the larger social environment.

## **CHAPTER FIVE: SUMMARY, RECOMMENDATIONS, AND IMPLICATIONS**

This study described the experiences of 6 women and 2 men as they moved from a directed work environment to a self-directed work environment. Qualitative data were collected through individual semistructured interviews with each participant and through on-site observations of each home office. Data analysis revealed five themes that reflected the impacts of the transition to a self-directed work environment on various aspects of the participants' lives. The themes were (a) impacts on the participants' personal lives, their roles, skills set, productivity, and physical environment; (b) support offered by the organization, family, and office administration; (c) personal development specifically relating to participants' learning needs and skills; (d) boundaries as they relate to family and work; and (d) insight into the skills and orientation requirements of future employees within a self-directed work environment.

This chapter begins by discussing the results within the framework presented in Figure 1. The theories of andragogy, transformative learning, self-regulated and self-directed learning, and learning within a social environment are used as a framework for discussion. First, the participants are discussed within the context of what they brought to the home office situation. Next, the participants' immediate environment is explored, and finally, the social environment in which the learning occurred is considered. This chapter goes on to discuss the implications for practice and theory and concludes with further research questions.

### **Discussion**

The interrelationship among the individual, the immediate surroundings, and the social environment appeared to play a key role in the enjoyment and adjustment process the participants experienced as they moved from a directed work environment to a self-

directed work environment. One theory describing the interrelationship between the learner and the environment is described by Cranton (1992) in a model for working with adult learners to facilitate the learning process. Building on Cranton's model, Figure 1 illustrates the interrelationship among factors in the learner, the immediate surroundings, and the larger social environment. A key difference between Cranton's model and Figure 1 is that Cranton's model primarily focuses on learner and educator characteristics, processes, and change, and while she does acknowledge the importance of the learning environment and social context in which the learning occurs, she does not develop these two areas. Figure 1 expands her model by identifying some specific characteristics or factors that influence the learning or social environments. One area where the two models are similar is that the learner is recognized as central in each model. Where the two models differ is that Cranton's model focuses on identifying specific characteristics of learners' and educators' personality, learning style, life phase, values, and other internal characteristics. She does not distinguish between learner characteristics and educator characteristics. Figure 1 addresses only the learner and offers fewer learner characteristics. The characteristics that were identified also include specific skills. Cranton's model does not address skill.

The proposed model primarily focuses on external influences and their impacts on the learner rather than on internal personal influences. The model is an integration of the personal, environmental, and social contexts that influence the learning process. The proposed model also differs from Cranton's model in that it recognizes the important roles that family and the organization play in influencing the learner's experience in a self-directed work environment. In this study, no single issue was identified as key to

making a successful employee within a self-directed work environment. The findings emphasized the complex interplay among the learner, the immediate surroundings, and the larger social environment.

### **The Learner**

Throughout life, learning opportunities are provided continuously through a variety of experiences. Those experiences could be formal and intended, such as within a classroom setting, or informal and as a result of an imposed or unplanned change of circumstance. The degree to which learning occurs in each of these experiences depends on the learner's ability to integrate the experience into knowledge, skills, and attitudes (Jarvis 1987; Kolb, 1984). This phenomenon was clearly evident among the home office participants. Through their responses, they demonstrated varying degrees of learning as each situation was influenced by unique individual, immediate, and social environmental factors within their lives. The most compelling example of this interplay was the difference in participants' attitudes towards enhancing their computer skills.

Opportunities for skill enhancement were available throughout the transition to a self-directed work environment through a combination of formal educational opportunities and informal learning opportunities. Those employees who wanted to be in the home office environment were more self-directed in their skill development than those who did not want to be in a home office environment.

The theory of self-regulated learning argues that, for independent, continuous learning to occur, learners must have a combination of academic learning skills and self-control so that they continue to maintain their motivation to learn (Woolfolk et al., 2000). This theory suggests that the participants would be at differing points within the learning

process, which was found to be the case. Although all respondents reported an increased knowledge and skill level in technology and all respondents also reported an increased skill in problem-solving and self-reliance, the degree to which the respondents engaged in the learning process varied.

McCombs and Marzano (1990) speak of learners needing both the skill and will to learn. This study supports that employees need both skill and will to function successfully within both self-directed work and self-directed learning environments. The data indicate that such employees need to have knowledge on several levels. First, they need to have a strong knowledge base in the use of technology and of the requirements of the job itself. Second, they need to be knowledgeable about learning strategies in that they need to have strong problem-solving skills to know how to address any challenge they may encounter. Third, they also must have self-knowledge so that they know what structures they need to put into place to maintain an effective work-personal life balance and the willpower to implement their structures and strategies. Finally, successful home office employees need to have the internal motivation to complete the assigned job.

One area of learning that seemed to be important in order for the participants to make a successful transition to a home office environment was the creation of a redefined sense of self. Mezirow (1985, 1990, 1991) referred to the refinement of the sense of self through the development of meaning schemes. He spoke of the importance of meaning schemes in guiding individuals in their lives. Further, he contends that the assumptions that people have of themselves and the world were developed through instrumental and communicative learning and are often challenged as a result of a life crisis. In this study,

the crisis experienced by participants was the transition from a directed to a self-directed work environment.

This study found that as a result of the life crisis of making the transition to a self-directed work environment, the participants had to develop new meaning schemes related to their identity. Further, it was found that those participants who enjoyed a home office environment seemed to be able to develop new schemes with greater ease than those participants who did not report enjoying the home office environment. A clear example of this was Jeris's assertion of losing her sense of identity, as she was no longer able to play her previous role within the community. Although she tried to establish a new identity within this new work environment, she was not successful and chose to leave the organization. On the other hand, Bob reported maintaining his work identity through strategies to enhance his visibility in the community.

The impact of isolation on Jeris and Bob, and their resulting ability to communicate with others, seemed to be a mediating factor in the participants' ability to create new meaning schemes and in their enjoyment of a self-directed work environment. Isolation can be reduced through opportunities for social contact. Social contact is also an opportunity for critical self-reflection and critical discourse through which learning occurs. Brookfield (1985), Candy (1991), Woolfolk et al. (2000), and Mezirow (1985, 1990) emphasized the importance of self-reflection in learning. Self-reflection provides a mechanism for the enhancement of learning. It is a means for the learner to examine past experiences and to integrate those experiences into knowledge, skill, or attitude. In this study, decreased isolation and the engagement in self-reflection were linked. It was

found that those participants who reported greater degrees of isolation did less self-reflection than those participants who developed mechanisms to reduce their isolation.

In this study, only Dave, Jeris, and Jane demonstrated engaging in self-reflection during the transition. They specifically made reference to increasing their self-knowledge as a result of this experience. They reported learning more about themselves and what they could accomplish within a self-directed work environment. Melissa was the only participant who reported previous engagement in self-reflection and knew herself well enough to know that a self-directed work environment would match with her abilities and work style. On the other hand, Jeris chose to leave the organization following the self-reflection process which gave her further insights into her needs within a work environment. As she stated, she was surprised by how much the isolation of a self-directed work environment would affect her because previously she had viewed herself as one who enjoyed time alone. This example shows the importance of social contact and dialogue with others in the definition of oneself.

Also cited by Freire (1970) and Mezirow (1981), discourse was identified as important for assisting people to analyze, evaluate, and express judgments. The importance of contact with others was also identified by Brookfield (1985, 1986). He stated that other people are the most important learning resource that a learner has. This dialogue with others can lead to a continuous re-creation of the individuals involved in the learning process and may assist with the feeling of control over their particular situation. This connection between dialogue and learning did not appear to be deeply appreciated by the participants in the study. As an example, several participants expressed reservations about engaging in dialogue with colleagues. Melissa reported not



wanting to let people know how much she was enjoying the home office environment. She felt that given her employer, others would expect her to not enjoy her job. Other participants confirmed this lack of discussion about the enjoyment of the new working environment. These participants reported not being really sure of the percentages of employees who liked or disliked the self-directed work environment because the dialogue had not occurred. Furthermore, although Jennifer and Dave both saw the value in having these opportunities for dialogue, neither of these participants took the initiative to establish a network with other home office employees. This lack of initiative to seek out supports was also seen with Julie, who knew she could pick up the phone to decrease her feelings of isolation but did not take the initiative. Instead, she expected that others should initiate contact.

Such lack of initiative may be reflected in the internal versus external control the participants perceived with respect to their work situation. Perhaps if the participants felt they had control over their work environment, they might have been more likely to take the initiative to create networking opportunities. Specifically, Julie might have been more likely to take the initiative to seek support from her colleagues. The process of dialoguing with others in similar work environments might have led to a decreased sense of isolation. The sharing of experiences and critically analyzing and evaluating situations with colleagues might have indicated similarities in their experiences. These similarities might then be recognized as part of the learning process, rather than perhaps being perceived as unique personal challenges.

Although the initial transition to a home office was a decision that was reported to be out of the participants' control, the process of self-reflection allowed the participants

to regain control of their work environment. The remaining respondents did not make specific reference to self-reflection, but each engaged in a learning process that, following a 6-month period, resulted, in all but one situation, in an increased comfort level within the new work environment. Julie was the only participant who reported continued discomfort with a self-directed work environment. It was interesting to note that she seemed to externalize the reasons for her discomfort, indicating that it was the responsibility of the organization to address her concerns, rather than engaging in a process of self-reflection to learn more about herself and the role she played in the reasons for the discomfort.

While Julie reported giving the control of her situation to the organization, Jeris reported taking control through learning more about herself and, as a result, making decisions that reflected her needs. A key difference between Julie and Jeris is that Jeris engaged in self-reflection. It appears that self-reflection is a significant factor in the feeling of control over one's situation. Woolfolk et al. (2000) and Brookfield (1985) each identified the importance of control in a successful self-directed learning environment. This perceived control over the situation can maintain an individual's motivation to learn and their ability to adapt to the new work environment.

Adapting to the new work environment requires support from different sources that provide opportunities for dialogue, which in turn provide opportunities for learning. The results of this study clearly show the importance of dialogue from many different levels and sources in order to facilitate the learning process and to accommodate the various personal situations. Peers, family, and the organization each can offer sources of support through dialogue. Several authors support the importance of dialogue to enhance

knowledge (Brookfield, 1985; Mezirow, 1990; Tough, 1971). In this study, the process of dialogue with others may have assisted in increasing participants' knowledge of a self-directed work environment. One aspect of knowledge is the awareness and skill to apply strategies within the context in which the participants are learning. The participants needed to know how to problem-solve around issues of technology, isolation, and maintaining community relationships. Each of these areas was an issue for all participants. The use of dialogue with others may have provided a mechanism to explore and address these issues.

All participants developed strategies in isolation to address these issues. The strategies were unique to the individual and their support systems. Self-directed environments are often seen to be isolating. Cranton (1992) addressed the frequent assumption that self-directed learning means that it is done in isolation from others. In the experience of the participants in this study, the isolation was mainly from work peers as, depending on a participant's situation, family became a support system. For example, with respect to technology, Tracey relied on her husband and self-teaching, Melissa used manuals first, then the traditional office secretary as back-up, and Bob relied solely on the traditional office secretary. The participants each developed strategies with varying degrees of isolation that were mediated by their personal situations.

The results of this study made it evident that the participants each had varying degrees of willpower. Willpower is an important aspect to the successful functioning in a home office. According to Corno (1992, 1995), willpower or volition self-regulates learners to protect themselves from distractions. In a self-directed work environment, self-regulation becomes important in employees' ability to discipline themselves in order

to get the job done. Distractions may occur externally through household chores, child care, or errands, and internally through boredom or procrastination. In summary, willpower requires discipline, and for discipline to occur, both internal and external structures must be in place.

This study revealed that the participants required varying degrees of internal and external structures to maintain their motivation to work. Some participants seemed to have a greater degree of internal discipline and therefore required fewer external structures, while others appeared to rely mainly on external structures to achieve discipline. Those participants who took full advantage of the flexibility offered by a home office and were able to return to work tasks at a later time suggest that they have more developed internal structures.

### **Immediate Surroundings**

The adjustment process from a directed to a self-directed work environment seemed to be mediated by the presence of the critical factors: control over the learning process and learning environment and a clearly defined work role. The issue of learner control over situations is addressed by Mocker and Spear (1982). They feel that self-directed learning occurs where learners control both the objectives for learning and the means of learning. In this study, the objectives for the move and the work to be accomplished were imposed by the organization, and the issue of choice was not clear to all participants. In fact, only two participants reported they felt they had control over the move into a home office. It was these two participants who reported the shortest adjustment period. This suggests that a critical factor in a self-directed work environment is that of control over the transition to a self-directed work environment.

Control over one's environment is addressed by Brookfield (1985). He speaks of needing to create a climate for self-directed learning with the following characteristics: the individual feels cared for, mutually respectful, conducive to dialogue, and is clear about and secure in their respective roles. A climate where the employees felt valued and secure in their roles was not evident during the transition period of the first 6 months. The participants expressed feelings of abandonment and lack of support by the organization, and this was exacerbated among those employees who lived alone. This finding suggests two things. First, it suggests that the organization did not acknowledge the significance of the transition to a self-directed work environment, and second, that particular attention should be paid to ensuring supports are in place to offer employees support, particularly for those employees who live alone.

This study identified key characteristics that facilitated a shorter adjustment period with the transition. The characteristics of feeling trusted by their supervisors, having a comfortable work environment, supportive family, and having a clear role within their new work environment were reported by participants who became comfortable within a home office within a 2-week period. Participants who reported a 6-month transition period did not raise the issue of trust, described a process of role redefinition, had supportive families, and a comfortable work environment. The participant who reported never feeling comfortable in her new work environment described feeling distrusted by her supervisor, was still struggling with her new role, and did not have a comfortable work environment. The discrepancy in adjustment periods leads to questions regarding which of the elements Brookfield (1985) identified: feeling cared for, mutually respected, conducive to dialogue, and clarity about and security in

respective roles, are more critical in facilitating self-directed learning. These findings suggest that some of the elements facilitate a quicker adjustment period. In this study, having a clearly defined role seemed to be the key factor in the length of the transition period.

A second important factor that was identified with respect to climate was that of work environment. Environment influences our ability to learn. Maslow (1968) suggests that our basic needs must be met prior to self-actualization or fulfilling one's potential. Specifically, one's growth needs prior to striving towards one's potential include aesthetic needs. Participants' aesthetic needs were evident as the location and décor of the respondents' work environment were of concern to all participants. The participant who reported still learning how to function successfully within a self-directed work environment also had a work environment with which she did not feel comfortable. This finding may suggest that the creation of an office location where participants' needs are being met, including aesthetic needs, appears to result in learners being more open and ready for learning.

### **Social Environment**

The findings of this study highlighted the importance of the larger social environment in the learning process. One aspect of the larger social environment is culture. Vygotsky (1986, 1993) asserted that cognitive development is dependent on the interactions with people and the tools that culture provides to support an individual's thinking. In this study, the culture that the respondents lived within had three aspects. The first aspect was that of the organization. The organization provided the necessary technology, some limited training opportunities, and administrative support through the

home office manual and access to the traditional office secretary for technical support and traditional secretarial services. The second aspect of support was from the respondents' families. The family members provided technical and emotional support to the respondents. The third aspect of support came from the community within which the respondent worked. The types of support offered by the community included providing storage and meeting space. Depending on the participants' personal situation, these cultural aspects displayed varying levels of importance in the learning process. Participants reporting fewer supports in one aspect reported greater difficulty functioning successfully in a self-directed work environment. With respect to the aspect of community support, it appeared that having greater support from the community facilitated role redefinition. For example, Dave reported receiving a great deal of support from the community, and as a result he felt reassured as his role became redefined.

One of the interesting findings was how the respondents' work culture now became embedded within their personal culture. There appeared to be a continuum to which this integration occurred. All but two participants felt that it was important to use strategies to clearly separate their work time from their personal time. Those who tried to keep the cultures separate would, for example, dress for work and change at the end of the day as they had in their previous work environment. The respondents who did not feel the need to create such a cultural separation would integrate work into their day by taking advantage of the flexibility allowed by a home office. Those participants who chose not to either fully integrate the two cultures or clearly define boundaries had greater difficulty adjusting to the self-directed work environment. Given these findings, it suggests that participants at the extreme ends of the work-personal culture integration

continuum were more successful in making the transition to a self-directed work environment and functioning effectively in the new situation.

Interaction with people was also identified by Jarvis et al. (1998) as important. By interacting with others, they believe that we learn from and alongside them, and this contributes to motivation. This assertion then would suggest that opportunities for interaction would be important in a work environment. In this study, social contact with peers and colleagues was greatly reduced by the move to a home office. Further, networking opportunities were also decreased. Networking served as a means for idea development, a sense of identity, and problem-solving among the participants.

Following Jarvis et al.'s (1998) belief that interaction contributes to motivation, it would be expected that the participant's motivation for work would be decreased. This decrease in motivation was observed with only one participant. The impact of the reduced social contact caused Julie to decrease her motivation for work, and she responded to the isolation by taking time off work. The remaining respondents responded to the decrease in social contact and networking by developing new strategies to combat the isolation. Further, they also developed mechanisms for idea generation and problem-solving. The strategies chosen fit within the resources easily accessible within a home office environment and were now deliberately initiated by the participants. These strategies involved the use of technology with E-mail and telephone and personal contact. Participants in this study were required to learn new ways to conduct business using the resources they had available to them. This area of learning represented the area of greatest growth for the participants.



The social environment in which the self-directed work environment operates influences the impacts experienced by the participants, with one of the largest influences being that of the organization. For the participants in this study, the organizational culture within which they worked is one of high productivity. The respondents' feeling that they could not take the necessary time to set up and adjust to this new work environment is clear evidence of this culture. This organizational expectation may be the result of the leaders' beliefs that the participants had the necessary skills or that the transition from a directed work environment to a self-directed work environment was minimal. This finding suggests that organizational leaders need to recognize the variance in skills required between a directed work environment and a self-directed work environment and that they need to carefully select individuals appropriate for a home office environment or, at a minimum, ensure that specific and appropriate supports are in place for the employees as they enter a self-directed work environment.

The participants of this study reflected upon the type of supports, attributes, skills, and orientation required for successful functioning in a self-directed work environment. The participants identified core competencies such as self-knowledge, job-specific knowledge, supportive environment, and problem-solving skills. The reflection that participants offered for new employees represented the areas where their learning was the greatest and how their preferred process for learning would occur for them. This was an example of the self-reflection process that had occurred during the previous year. It was only through the process of self-reflection and experience that the participants gained insight into the elements of a successful self-directed work experience.

In summary, the transition from a directed work environment to a self-directed work environment is a complex interrelated process. One common element found throughout the theoretical framework is that of participant control over their situation. Equally important, the findings revealed that self-reflection was an integral part of the learning process and that it facilitated a successful adjustment process. Further, the adjustment process was also facilitated when a clearly defined work role and means for dialogue were present in the work environment. Within the work environment, the physical environment was found to influence climate; as well, support structures both within the participants' immediate surroundings and the larger social environment were required for a successful self-directed work environment. Within the participants' immediate surroundings, the degree to which a cultural separation between work and personal time occurred influenced the length of adjustment period required by participants. The results reveal that it is no one factor that makes an individual function successfully within a self-directed work environment, but that it is the interrelationship among the learner, their immediate surroundings, and the social environment which will have the greatest impact on success.

### **Recommendations**

In order for adults to function successfully within a self-directed learning environment or self-directed work environment, certain core issues should be addressed. Four critical issues are structures, support, climate, and knowledge and skill.

The creation of structures, which is the first critical issue, serves as a framework from which adults can function. The results of this study indicate that structures need to be developed both externally and internally to create a successful environment.

Externally, structures contribute to the motivation to achieve tasks that are required by the employee or learner. These structures could include a specified location for work, specific hours of work, or a specific dress for work to create a mental shift in roles. The presence of external structures can assist with the development of internal structures. Internally, structures contribute to willpower and the necessary self-discipline to function within a self-directed environment. Internal structures reduce the incidence of procrastination that is a frequent issue within a self-directed environment. Examples of internal structures could include a psychological shift to a work environment, self-discipline, or a strong work ethic.

The second critical issue is ensuring that support systems are in place. The experiences of these participants indicate that support systems need to be available on many levels. First, peer support is important for solving problems and for decreasing isolation. This may take the form of a network within an employment setting or a study group within an academic setting. Second, family support is important as family time is affected within a self-directed academic experience and family space is affected within a self-directed work environment. Third, organizational support is important to assist with problem-solving, technical support, and a feeling of connectedness. This support may take the form of an on-line tutorial or help line, secretarial support, and inclusion of the self-directed individual in organizational events.

The third critical issue is the establishment of a climate that facilitates the learning process. This climate needs to have two key elements. First, learners must have a sense of control over their environment and learning process, and second, the learner's role needs to be clearly defined. The elements of control and a clear role were found to

facilitate the transition to a self-directed work environment. What this may mean in an employment setting is that the establishment of an appropriate climate may take the form of employee choice in working in a self-directed work environment or in setting their work hours. Consistent with adult learning principles (Cranton, 1992), learners could set their own learning objectives, assignments, and deadlines.

The fourth critical issue is knowledge and skill. A strong knowledge base should be present in the following areas: the tasks and requirements of the job, the use of technology, awareness of self, and self-reliance in the ability to apply problem-solving and other strategies within the work context. These skills and knowledge were identified by the participants and found to be factors that contributed to successful functioning in a home office environment.

### **Implications for Practice**

This study has implication for at least three key areas of practice: staff development, home office environments, and self-directed learning within educational institutions. This research provides insight into how the learner, their immediate surroundings, and the social environment can work together to maximize the success of the learning process within a self-directed environment. In addition, given the interrelatedness of the three areas, changes in one area can be expected to influence changes in the other areas. Given this interrelationship, it is important that learners, employers, and educators attend to each of the implications for practice.

The organization that provided the context for this study is similar to other organizational contexts in the social services and the not-for-profit sector in relation to the reduction in funding for staff development. This decrease in funding has resulted in

employers and employees seeking alternative educational opportunities rather than the traditional strategies of on-site workshops. Employers are also relying on the self-directed learning of staff for personal development. Further, there is a movement toward the employee taking more responsibility in meeting their professional learning objectives rather than the employer taking full responsibility for meeting the learning needs of the employee. These conditions thrust employees directly into self-directed learning experiences, which sets up a constellation of pedagogic and organizational concerns as demonstrated in the lives of these participants.

Given the findings of this study, it is apparent that, for an employee to become an effective self-directed learner, structures need to be in place within both the organization and the family to support the learner's efforts. There also needs to be a support system in place where the learners can discuss their experiences with others. The learning opportunities need to have a clear relationship between the new learning and the timely ability to apply the new knowledge. These structures, supports, and opportunities will facilitate the critical reflection that is required for learning to be optimized.

In the organization under study, home office locations remain an acceptable and cost effective organizational strategy to maintain service at a lower cost. As technology advances, opportunities are created to lower costs through establishing further self-directed work situations. If self-directed work environments are to be expanded, the results of this study suggest that employers need to ensure that certain conditions are in place for a successful transition to a self-directed work environment. First, when leaders select employees to go into a home office, careful thought should be given to providing the employees with the resources they require within a self-directed work environment.

Ensuring that the appropriate resources are available acknowledges that there is a transition from a directed work environment to a self-directed work environment and that this transition requires adjustment and a learning process. Second, the organization needs to ensure that the employee has a core knowledge base of the job itself prior to entering a home office environment. This knowledge base will decrease the scope of the learning that must occur. Further, the employee needs to have a location within their home where it is comfortable for them to work, and the employer needs to ensure that the employee has both the necessary technology and the necessary knowledge to operate that technology.

Finally, the results of this study have implications for universities and colleges in which distance and self-directed learning are increasing with the development of virtual degrees, the expansion of correspondence and on-line courses, and the increase in the number of self-directed courses such as directed readings. This movement towards more self-directed learning is also being seen at the secondary school level with the institution of mandatory community service. The changes in the secondary and postsecondary institutions with the increase in self-directed educational opportunities may be in response to the changing work environment. Students need to learn to become more effective self-directed learners as adult learners seeking to upgrade their skills and knowledge in a cost- and time-effective manner.

This study suggests that for the self-directed learning experience to be positive, and for learners to maintain motivation to complete the course requirements, they need to have a support system available to them. This support system may be in the form of study groups, mentors, or colleagues with whom to discuss varying learning issues. As

this study found, not all adults will take the initiative to develop their own support system. Given this finding, educators will need to ensure that the support systems are an integral part of the course delivery.

This study also suggests that within educational systems, there is a need to prepare students for becoming self-directed learners. As part of the preparation process, educators need to ensure that students will have a core knowledge base from which to draw when new experiences are presented. Further, educators need to use methods that increasingly allow the student to become self-sufficient in their learning process. Teaching students to become self-directed learners will better prepare them for self-directed work environments and enable students to engage more consistently in lifelong learning processes.

### **Implications for Theory**

Five major contributions were made to theory as a result of this research. First, Cranton's (1992) model for working with adult learners was expanded. Her model was extended to include factors within the learner's immediate surroundings and larger social environment that influence the learning process. Specific factors, such as the importance of role definition, were identified as a critical element in a successful self-directed work environment. Another factor identified as critical is ensuring organizational supports are present to support networking opportunities.

Second, there was recognition that a learning process is a complex interplay of forces within the learner's environment. The adult education literature suggests that most or all adults learn in a similar manner (Knowles, 1984a). This suggestion, however, fails to recognize the significance of the interrelationship of individual and environmental

factors. The research reported in this document demonstrates that, although the participants in this study had a similar knowledge of the job, the way in which they learned to adapt to their new work environment differed depending on the environmental influences affecting their lives. This speaks to the uniqueness of each adult learner within a specific learning environment. This finding suggests that theories need to be expanded to examine learning within specific contexts to account for the interrelationship between environments rather than provide a generic theory to address all learning experiences.

Third, the learning environment was identified as a critical issue in facilitating a successful self-directed work environment. This study revealed that the learning environment contributes to the amount of learning that takes place as well as the learner's responsiveness to the learning. Current theories, such as Brookfield's (1985), recognize the importance of the learning environment but do not identify the critical elements within the creation of the learning climate. This study revealed that role definition, the physical environment, and perceived control were at least three specific elements that had an impact on the learner's readiness and openness to learning. Theory must then be refined to highlight these specific elements.

Fourth, supports from peer, family, and the organization were found to facilitate the transition from a directed to a self-directed work environment and to help redefine the identity of the employee. Each of these supports was found to contribute to the learner's positive experience. Specifically, organizational supports that facilitated social contact with work peers were found to be a critical aspect in the facilitation of the learning process. Within the family and peer domains, opportunities for discourse will facilitate



the learners in their redefining of their identity within a self-directed work environment. Current theory does not fully recognize the importance of these supports or how they contribute to the development of identity.

Fifth, the perceptions and expectations of community, the organization, and peers were found to influence the learning process. Current theory does not acknowledge the role that the larger social environment has on the individual learning process. The role of the social environment within this study revealed that the social context in which the learning occurred also influenced the learner. The expectations of the organization and the perceptions by the community, organization, and peers each influenced the learning process. The feeling of trust between the supervisor and employee, organizational acknowledgement of the learning required to adapt to a self-directed work environment, the understanding of the community with the newly defined work role, and the perception of not being unfairly affected by being in a self-directed work environment each were identified as important factors that should be highlighted in current theory.

### **Implications for Further Research**

A further examination of the learner characteristics for successful self-directed work learning environments would enhance the research literature. The fact that much of the research has been done within typical educational settings provides opportunities for further exploration. This study involved only a small number of participants within one particular organization. Further research is required to understand if the theories and models developed with educational settings are applicable within a variety of work settings. Specifically, the following questions could be answered:

1. What are the core competencies of a successful home office employee?

2. What type of work is best suited to home work environments?
3. Does a self-directed work environment result in increased evidence of self-directed learning occurring in other aspects of the individual's life?
4. What aspects of the interrelationship among the learner, learning environment, and social context are critical to effective learning?

The response to these questions will provide insight into the application of adult education theory within work contexts and can help to determine if new theories need to be developed or if existing theories need to be modified. Such research can assist in bridging the gap between theory and practice and could guide practitioners in creating work environments that facilitate the learning process.

### **Conclusion**

This study indicates that effective functioning within a self-directed work environment is a complex series of interrelationships among the learner, their immediate surroundings, and the larger social environment. A successful adaptation of a self-directed work environment involves individual factors such as the ability to creatively address new challenges and to develop new strategies to overcome these challenges. In addition, attention to the physical work environment, the establishment of boundaries between work and personal time, and the clearly defined work role are key elements to a successful work environment. Finally, the social environment and the supports that are available within it are necessary to address the challenges the learner faces in self-directed environments.

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## Appendix A

## Ethics Approval Form



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**Brock University**

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Research with Human Participants

Extensions 3573/4315, Room B317

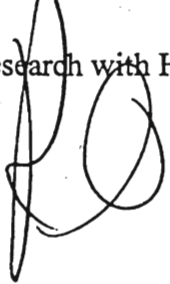
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**FROM:** Robert Ogilvie, Chair  
Standing Subcommittee on Research with Human Participants

**TO:** Coral Mitchell, Education

**FILE:** 97-215 Heather Chalmers

**DATE:** June 30, 1998



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The Brock University Standing Subcommittee on Research with Human Participants has reviewed the research proposal:

**The Transition from a Directed Work Environment to a Self Directed Work Environment**

The Subcommittee finds that your revised proposal conforms to the Brock University guidelines set out for ethical research.

RO/tar

## Appendix B

### Consent Form

#### Brock University Department of Education **Informed Consent Form**

Title of Study:           An Examination of the Home Office Experience

Researcher:             Heather Chalmers, M. Ed. Candidate

Advisor:                Coral Mitchell, PhD, Brock University

Name of Participant: \_\_\_\_\_

I understand that this study in which I have agreed to participate will involve a 2 hour interview with Heather Chalmers and reviewing transcripts for accuracy. I understand that the interview will involve questions relating to work, career, and family. I understand that the data will be analysed for the purposes of a report to Community Department (CD) Management and for thesis requirements for a Masters of Education.

I understand that my participation in this study is voluntary and that I may withdraw from the study at any time and for any reason without penalty.

I understand that there is no obligation to answer any question/participate in any aspect of this project that I consider invasive.

I understand that all personal data will be kept strictly confidential and that all information will be coded so that my name is not associated with my answers. I understand that only Heather Chalmers will have access to the data.

Participant Signature: \_\_\_\_\_ Date: \_\_\_\_\_

If you have any questions or concerns about your participation in the study, you can contact Heather Chalmers at 905-525-1250 or Coral Mitchell at 905-688-5550 ext. 4413.

Feedback about the use of the data collected will be available during the month of November, 1998 following acceptance by the CD Management Committee and will be distributed to each office.

***Thank you for your help!*** Please take one copy of this form with you for further reference.

I have fully explained the procedures of this study to the above volunteer.

Researcher Signature: \_\_\_\_\_ Date: \_\_\_\_\_

## Appendix C

### Interview Questions

1. How long have you been working with the organization?
2. Please describe a common day for you.
3. How are your days different from when you were in your old office?
4. What percentage of time are you physically in the office?
5. What were the challenges you faced when you first moved into a home office?
6. What challenges do you continue to face?
7. Has having a home office had an impact on:
  - your family? If so, how?
  - your work? If so, how?
  - career opportunities? If so, how?
8. What training needs did you have going into a home office?
9. What training needs do you have now?
10. What training needs do you foresee on an ongoing basis?
11. What skills have you developed/refined by working in a home office?
12. What is your impression/perception of how well home offices are working from the point of view of:
  - employees
  - the organization
  - the community
13. Do you think there is a difference between the work done in hub offices and home offices? How is it different?
14. Do you perceive that there are differences between the work assignments of home and hub office staff? If so what differences?
15. What are the benefits of working from a home office?
16. What are the disadvantages of working from a home office?
17. Why did you choose a home office over a hub office?

18. How much control did you feel you had in the decision to move into a home office?
19. How long did it take to get comfortable in your home office? What helped your comfort level?
20. What secretarial/technical support do you get? Do you feel you need additional support? If so, what?
21. What suggestions do you have for improving your situation?
22. If given a choice, would you alter your work situation? If so, how? e.g., hub office, hybrid office -- why?
23. If you were to hire for a home office, what skills and attributes would you say a person needs to have?
24. What orientation would be needed for someone hired to work from a home office?
25. Do you have any suggestions for other home office staff? Things you do that are helpful in a home office environment?